



# CHESS

## WORDS *of* WISDOM

### **The Principles, Methods and Essential Knowledge of Chess**

**MIKE HENEBRY**





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### **The Principles, Methods and Essential Knowledge of Chess**

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You should not trade pieces if you have the initiative

Opening the position helps to exploit weak squares

The best number of pawn islands to have is two

Exchanges increase the chances of mobilizing the majority wing

When behind in pieces, trade pawns, but not pieces

Calculate wide, not deep

Space is usually more important than time

Releasing the tension reduces your options

The player playing against the IQP should usually exchange all of the knights

You should not mobilize pawn structures that have doubled pawns

If a move looks bad on general principles, the plan is probably bad

The side with a positional advantage has no need to complicate

Knights are often better than bishops in blitz

A plan is made up of ideas, not moves

Trying to play the best move and playing to win are not the same

When faced with a critical position, you have to calculate variations

A gambited pawn is equal to three tempi

With the initiative, miracles can happen

Do not ignore your intuition

The weak point of the fianchetto position is the h3 (h6) square

Complications are good for the side that is losing

Long analysis, wrong analysis

If the move feels wrong, it usually is

The fianchettoed bishop is not as good as a pawn is in guarding holes

Do not win a pawn if it costs you more than two tempi

Sharp openings are best in blitz

The initiative is especially important in blitz

To play chess at a strong level, it is essential to play according to sound principles

To increase the influence of your fianchettoed bishop, open the center

A temporary advantage must be exploited at once

When you fianchetto one bishop, the other bishop automatically loses a little of its mobility

Rooks attack best from a distance

You should not change openings because the opponent is higher-rated

Passive defense can work against rook and knight pawns, but it does not work against inner pawns

An imbalance is a double-edged sword

Pawns gain in strength as the power of the pieces left on the board decreases

There is a difference between blitz and time-trouble

Exchange your redundant rook for your opponent's only rook

When ahead pieces, trade pieces, when behind pieces, trade pawns

When you are ahead on pieces, trade pieces (but not necessarily pawns)

Connected passed pawns on the 6th rank beat a Rook

The more redundant two pieces are, generally the weaker they are together

A lead in development is less important in closed positions

An advantage in development leads to other advantages

Poor development is a key breeding ground for opening traps

It is usually a good strategy to put your pawns on the color opposite of your bishop

He who fears an isolated queen's pawn should give up chess

Space is not an advantage unless you can use it beneficially for maneuvering and for piece play

A three-to-two majority is easier to convert into a passed pawn than is a four-to-three majority

Plan your action on the side of your pawn majority

A central pawn majority favors the attacker

The fewer pawn islands you have the stronger the structure is

The square in front of the backward pawn is the main factor

Having a rook on the seventh rank is worth about a pawn

It is best to leave active pieces where they are

The initiative is above everything

Tactics flow from superior positions

Only calculate when it is essential

Bishops gain in strength as the endgame approaches

Calculate the moves that are forcing and tactical first

The player with an advantage must attack

Only the player with the initiative has the right to attack

If an attack can succeed with pieces alone, then leave the pawns where they are

It is usually better to have the rook in front of the queen when playing on an  
open file

If there are no weaknesses, you do not have an attack

Queen exchanges are usually better for the player who is attacking on the  
queenside

Take the minimum risk and use the maximum in economy to stop an attack

Only defend against direct threats

Bishops and knights rarely coordinate well with each other

A sudden change into an endgame can throw an attacker off his game

Three useable diagonals are worth a pawn

Plans are usually made for just a few moves at a time

Any imbalance should give the stronger player an edge

Wing pawns become more valuable relative to central pawns as material  
diminishes

There is no room for mistakes in a king and pawn endgame

It is usually a mistake to move a pawn on the side where your opponent is

attacking

Try to meet short-term threats with long-term moves

The first player in an open position to control an open central file will  
generally get the initiative

It is usually wrong to remove a piece from an open file to avoid exchanges

Play where you have the advantage

You can usually allow weaknesses in your position in return for good piece  
activity

The move g3 is usually a more weakening move than h3

A weak square for one player is potentially a strong square for the other

You cannot consider the white and black squares in isolation when analyzing a  
position

Color Complex weaknesses are not as important when the minor pieces are  
gone

A support point is only valuable if it is near the action

When your pieces are coordinated, they develop extraordinary power

If you have the bishop pair, put your pawns on the same color as your  
opponent's remaining bishop

If you are facing a double fianchetto, try to close the position and gain control  
of the center

The knight pair is not a good combination

Never use a rook to defend a pawn

If you have a dynamic advantage, but a static weakness, it might be better to  
keep your queen

If the rooks cannot penetrate, it is often worth the sacrifice of the ex-change to  
force penetration

# ***CH*ESS**

*WORDS of WISDOM*

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The Principles, Methods and  
Essential Knowledge of Chess

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**MIKE HENEBRY**

2011

Russell Enterprises, Inc.

Chess Words of Wisdom  
The Principles, Methods and Essential Knowledge of Chess  
by  
Mike Henebry

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# ***Introduction***

AS YOU CAN TELL at a glance, this is not a typical chess book. It is all text. There are no diagrams; there is no analysis, and there is not even a single game or variation in the entire book.

*CHESS WORDS of WISDOM* is, basically, the summarization of about 400 chess books, plus hundreds of magazine articles, videos, DVDs, and web sites. It is, essentially, the crucial information from all of these sources condensed and assimilated into this one book. As a result, it is extremely comprehensive. Hundreds of experts, masters, IMs, GMs (and even a few scientists and generals) have been quoted, paraphrased and summarized in the process of compiling this book.

Normally, chess books are teeming with moves, diagrams, and variations, but explanations are sparse. Instead of enlightenment, there are usually a lot of vague and often unhelpful comments, such as “If he would have gone here, I would have gone there,” “a better move was this...,” “there was something to be said for that...,” and “weaker would have been...” You are often left to deduce the actual lessons yourself.

Most chess books are excellent, and there is clearly merit to the typically conventional way that the material is presented in them. Yet the fact remains that many chess books contain only a few paragraphs of valuable advice, while the great majority of the space is devoted to the moves and diagrams. There is nothing wrong with the idea of using several pages of examples to reinforce one sentence of advice, but it is not always entirely necessary either.

It is fun to play over master games and, even if they are sparsely annotated, you do learn something from going over them (by osmosis if

nothing else). The point, though, of buying an instruction book is to be “instructed.” You want to “learn” something from the book. You want to “understand” the subject, and the best way to learn or understand something is to have someone, who already knows the subject, “explain” it to you in words... no guessing, no osmosis, just simple talk in plain English. For that, you do not need a diagram. The renowned trainer and author, Mark Dvoretsky, would probably agree, since he said:

When young chess players read a book or listen to a lecture, too often they pay attention only to variations, letting slip past their eyes (or ears) the author’s judgment. I am convinced that for this reason they miss a great deal; usually the most valuable information is concentrated in the words. (Mark Dvoretsky, *American Chess Journal*, No. 3).

In the *New In Chess* compendium, *The Chess Instructor 2009*, edited by Jeroen Bosch & Steve Giddins), a book aimed primarily at chess teachers, coaches and parents, Steve Giddins, in his article “Learning an Opening,” said:

Whenever possible, the notes should be in prose form, rather than the Informator-style figurine notation—what one is looking for is verbal explanations of the ideas behind the moves, not a forest of variations where the wood is hidden by the trees.

I got serious about studying chess in the mid 1960’s. From the beginning, I underlined important concepts in the chess books that I read. I would then add these *words of wisdom* to a notebook. The notebook was for my own occasional review, and for study when preparing for a tournament. I continued this practice for many years. Then, when personal computers came into common use, in the mid 1980’s, I copied the notebook into a computer file (to which, to this day, I continue to add material).



About eight years ago, and after more than 40 years of collecting these notes, it was clear that there was more than enough material in the notebook for a book. One day, I said to my wife, "I have enough here to write a book." She said, "Then, why don't you?" As a result, and with the knowledge that, now, she could not complain about the time I would be spending on it; I started writing this book.

My original plan was to use the quotes, "as is." In other words, to write a book of compiled quotes. However, a few years into the project, and after collecting and organizing about a thousand pages of quotes, I discovered that it would violate a number of copyright laws to publish such a book.

Even though my plan was to give full credit to each source, there are laws that prevent excessive quoting from any one source and laws barring lengthy quotes without signed releases from the sources. That meant, to publish the book, there were just two choices: get releases from all of the people and publishers involved (which, if even possible, would take several years to do), or to express in my own words what they were saying (as in a research project). I decided to do the latter.

I started over, and for about the past five years, I have been writing this book from the quotes and notes in my notebook (plus what I have been adding during that time). However, this time, instead of using nothing but quotes, I have summarized the experts in my own words and edited it all into this one cohesive book. As it turned out, the book is even better, this way, than it would have been as a collection of quotes. It is much more readable and coherent, and it is about half the size.

I have used an ample, but legal, amount of credited quotes. Credit is given to all of the people that were used as sources (whether they were directly quoted in the book or not). There are in-text citations, as well as acknowledgements and a list of sources at the back of the book.

The idea was to write a book that contained most of the practical, useful

knowledge of chess. *CHESS WORDS of WISDOM* is the summing up of the vital information, the “meat,” from all of the wonderful books, magazines and digital media that you see listed at the back of this book. Essentially, incorporated into this one book are the teachings from all of these great sources.

I have over 600 books in my personal chess library. *CHESS WORDS of WISDOM* is based on only about 400 of those books. The reason the other 200 books were not used is that they did not contain any useful verbal general information at all (none!). They were all helpful books, in their own way; they may have had many variations of specific lines and the related advice on playing those particular lines. However, they did not convey any practical verbal knowledge that would help a player to learn, in general, how to play better chess (which is the point of this book). The approximately 400 books listed at the end of this book *did* have something to say (and I can recommend all of them).

As a digest of hundreds of years of chess knowledge, *CHESS WORDS of WISDOM* is an ideal textbook for chess teachers, coaches or trainers. Some of it is fundamental, some is intermediate, and some of it is advanced technique. The book should not become outdated soon either, because it is primarily about the principles of chess... and they do not change as fast as the latest trends do.

*CHESS WORDS of WISDOM* contains many of the general principles, truisms, maxims, general rules, fundamentals, axioms, aphorisms, beliefs, lessons, ideas, precepts, tips, practical advice, formulas, recommendations, insights, systems, techniques, paradigms, procedures, dogmas, guidelines, laws, opinions, methods, admonitions, proverbs, tools, heuristics, conventions, suggestions, tricks, adages, teachings, doctrines, golden nuggets, truths, tenets, council, short cuts, rules-of-thumb, general advice, and chess pearls of *wisdom* from the Masters.

By not devoting the typical two or three pages of examples to each concept in the book (as most chess books do), *CHESS WORDS of WISDOM* is shorter by an estimated 40,000 pages (and about eight feet thinner)! Even without diagrams and examples, most players should not have any trouble understanding the vast majority of the concepts in this book. If, on a certain topic, though, you do feel that you would benefit from diagrams, further explanation, or some examples, you can get all of that (and more) from the sources listed in the back of the book.

*CHESS WORDS of WISDOM* will be valuable for serious chess players from beginner to master. In other words, almost all players will find it instructive and should benefit from it. Experts and masters can use it as a concise reference or review. It might even fill in some holes in their stores of knowledge as well.

If you think you know most of the principles and rules of thumb of chess, you are probably wrong. As Alekhine said in a BBC interview in 1938, “A lifetime is not enough to learn everything about chess.”

These days, cartoons and humor are a big part of many chess books. *CHESS WORDS of WISDOM* is about “understanding” chess. There are no frills or cartoons in it. There is no nonsense of any kind in it... just hard-core, wall-to-wall, chess instruction in the form of verbal explanation. This book is for the player who is serious about understanding chess.

In most books, on almost any subject, there is respite and fluff. There is nearly none of that here. Almost every sentence of this book contains valuable insight. It is relentless. The aim was to pack it with useful instructional information, not to be an entertaining read. Here, the lack of fluff also helps to keep the book down to a reasonable size. For the same reason, I have not used text boxes (you know, those annoying space-consuming extracts that waste your time by repeating what you just read in the body of the text). The section on individual styles is a bit of a let-up, a slight diversion, but it is instructive,

nonetheless, and particularly motivating.

Unlike most books, *CHESS WORDS of WISDOM* is not the opinion of one author (not even the opinion of *the* author). Consequently, there are likely to be a few instances where some quotes or statements might seem to (or actually do) contradict each other. That is because various experts may have had conflicting opinions about the subject at hand. Quoting Dvoretsky again, “In chess, there is no such thing as absolute truth. Diametrically opposing styles and approaches to problem-solving each have a full and complete right to exist... It all depends upon the concrete circumstances” (Mark Dvoretsky, *Dvoretsky’s Analytical Manual*). By their nature, all such disagreements are likely to be minor, though; the experts rarely disagree about the major principles these days. For the past few generations, we have just been fine-tuning them.

In the interest of space, I have made a few allowances. For instance, there are very few definitions in the book. Most of the people reading this book probably know almost all of the terms that have been used here. Any definitions that might be needed, though, can be found easily in the glossaries in most other chess books or on the internet. The list of sources at the back of the book is abridged. It does not include page numbers, publishers, dates, or editions (as in a full bibliography). These days, by plugging the title and author into a search engine, you will get all the information you want, instantly, along with many web sites for locating the book or source in question.

The words “usually” and “generally” show up a lot throughout the book (879 times, to be exact). That, of course, is the nature of chess. In chess, as in most other pursuits, every rule has an exception. Still, I tried to keep the use of those words to a minimum, so as not to sound too repetitive. As it is, though, whenever something is stated in a way that sounds unconditional, please feel free to add the words “usually” or “generally.” The same goes with the phrase “unless there is a tactic.”

The male gender has been used throughout the book. Not only is chess

male dominated, but also many pages were saved by not saying “his or her” every time it was applicable. Furthermore, that much use of “his or her” would have gone well beyond political correctness and might have even seemed patronizing.

The boldface in the quotes is mine. In some of the quotes, I have also Americanized the British English and grammar. What do they know about English, anyway?

I also want to acknowledge the generous help from Mike Brady, PhD (Professor of Economics, published author, strong A-player, and friend of 35 years) for his help in proofreading the manuscript. Without his help, there would have been, on the average, at least one more punctuation error or typo on every page!

In addition, I would especially like to thank GM Larry Kaufman for his kind help with the area of values and equivalents (and a couple of other sections as well). I had simply asked him if he wanted to update any of his decade-old calculations. He not only did so, but he graciously went way out of his way to give me a lot of extra information and several useful suggestions. As probably the world’s leading expert on the subject of chess values and equivalents, his help was priceless.

Thank you for buying my book. Writing it has been a labor of love. In fact, after all these years, I know I will miss the 25–30 hours a week that I spent working on it! I sincerely hope that *CHESS WORDS of WISDOM* will be a beneficial addition to your library and to chess literature in general.



# 1



## *Opening*

*Your game is usually won or lost in the first ten moves.*

**—Sammy Reshevsky, *How to Win In the Chess Openings*, I.A.  
Horowitz**

OF THE THREE PHASES of a chess game (the opening, middlegame and endgame), only the opening is always a part of every game. In other words, every game has an opening; however, not every game has a middlegame or an endgame. Therefore, opening principles have a little more importance and urgency than the principles that deal with the middlegame and endgame. Edmar Mednis said, in his book, *How to Play Good Opening Moves*, that the Germans have an expression that goes something like, “A good opening means that the game is half won.”

If your opponent plays soundly, you cannot win the game in the opening, but you can definitely lose the game in the opening. A quick knockout, an attack or even trying to gain material in the opening, are impractical ideas and can be dangerous to try. You should try to accumulate small advantages with an eye toward exploiting them later during the middle-game. The opening can be treacherous because your guard can easily be down.

The goal in the opening is to develop your pieces, maintain a good pawn structure, and a good position for the coming battle (basically, to get into a comfortable middlegame). Gaining a positional advantage during the opening

is probably the loftiest goal you should have. It is not the right time to try to gain material or start an attack. You have to prepare (such as developing the pieces) and conditions must be correct before preparing for any higher objectives. “The ability to put into effect correctly the opening principles is the first essential condition for the perfecting of one’s play in the opening” (Alekseï Suétin, *Three Steps to Chess Mastery*).

This is not to say that you should not be alert to tactics and ready to start forming plans. Tactics and strategy are fundamental elements of the opening. It is important to know the opening principles, not only to improve your opening play, but so you can take advantage of any mistakes that your opponent makes.

The opening is an extremely dangerous stage of the game—one of the reasons being that you simply don’t think you will do something silly on move 5-6-7 or even 10. You expect the game only to get going later—and the opening moves are just preparation for that... (Ronen Har-Zvi, *Chess*, August 2008)

## WHITE AND BLACK

In the opening, white has an advantage due to having the first move (later on in the game, this advantage tends to dissipate). As a result, there are different approaches to playing white or black in the opening (because of the advantage of the first move). Statistically, grandmasters playing white score about +3,=5,-2 out of every ten games. GM Larry Kaufman, in his article, “The Evaluation of Material Imbalances” in the March 1999 issue of *Chess Life*, calculated that **the advantage of having white is worth approximately 40 rating points**. He added, in a recent email to me:

This is still a reasonable statement, but the value of White goes up steadily

with the level of the players. The above value is probably roughly correct for Grandmasters in general. For ordinary masters it may be more like 30, and for World Title contenders about 45. I have no data on the value of White for amateur or novice players. (Larry Kaufman)

White has a better chance of winning than black does. Mark E. Glickman, who wrote the article “Chess Rating Systems,” in the *American Chess Journal*, Number 3 calculated an estimate of white’s chances of winning. He estimated white’s chances to be 1.56 times better than black’s.

Because of the advantage of having the first move, white has a little more leeway for inaccuracies in the early opening. White also has the opportunity to be the first to occupy space and he has an automatic lead in development. From this advantage, he should seek a real advantage during the opening phase. He can use his move advantage to help create a superior pawn structure and positional advantage or he can develop quickly and start an attack before his opponent is ready to defend. However, if white does not make good use of this small advantage of the first move, it will probably be lost.

Most often, black should try to equalize before expecting to gain the advantage or the initiative. It is a little harder to win as black. Any small error or inaccuracy on black’s part in the early opening can be serious for black. If black wants to go for a win he usually has to stay away from symmetrical positions and must take a few risks. “The turning point in my career came with the realization that black should play to win instead of just steering for equality” (Bobby Fischer, *Chess Life*, March 2008).

However, in any game, even the most primitive, there are psychological nuances. And this applies to chess. In some sense, psychologically, it is easier playing black. White is obliged to attack, whereas for black it is sufficient to play for equality. For black, when defending, it is easier than for the opponent to maintain his composure. (Victor Korchnoi, *My Best*

The same idea goes for gambits. White is the one who can afford to play an opening gambit. Black can (and does) play gambits, of course, but it is riskier for him since he is a move behind. Whatever compensation white gains from the gambit is in addition to his advantage of having the extra move. Whereas, with black, any compensation gained is at least partially offset by the disadvantage of not having the first move. The choice of an aggressive opening by white does not always lead to a one-sided destruction of black. Rather, it tends to make the situation double-edged. The slightest miscalculation can reverse the roles of attacker and defender.

Of course, the stronger player is most likely to win regardless of color. Mikhail Tchigorin made this point with his famous quote: “When I have the white pieces, I win because I am white; when I have the black pieces, I win because I am Tchigorin.”

## THE CENTER

**The four central squares (e4, e5, d4, d5) are the most important squares to control.** “No violent attack can succeed without controlling at least two of these squares, and possibly three” (José Capablanca, *Chess Fundamentals*). The surrounding squares (c4, c5, f4, f5) are the next in order of importance. The center, then, consists of eight central squares... four squares wide on two ranks (the 4<sup>th</sup> & 5<sup>th</sup> ranks).

Even though they have differed somewhat in method, all of the schools of chess have agreed that the center is of paramount importance in all openings and that it is more important to control the center after about 12–16 moves into the game than by just the first half dozen or so moves. The Classical School advocated occupying the center right away with pieces and pawns. The Hypermodern School believed that, by letting the opponent advance his center

pawns unchallenged, those pawns might become targets. As Tarrasch said, “Chess is a terrible game. If you have no center, then your opponent has a freer position. If you do have a center, then you really have something to worry about!”

**CONTROL OF CENTER:** Until an obvious plan emerges, you should develop your pieces so that they point to the center. If your position allows it, having both pawns in the center (e4 & d4) is a strong setup. If a chance to get pawns on e4 and d4 arises, you should most often take it without waiting since the opportunity might pass.

**A piece does not have to occupy the center in order to exert central control.** It can influence the center by pinning a piece that attacks the center, or by aiming at the center from long-range or short-range. A bishop, rook or queen can also indirectly attack the center through another piece.

All of the schools agree that controlling the center is one of your top priorities in the opening. Control of the center by pawns is more long lasting than is control by pieces. The actual occupation of the center confers control, especially if your center pawns are mobile. Many experts recommend that you try to **maintain at least one pawn in the center.**

The modern approach suggests that “piece placement” (rather than the placement of pawns in the center) and “function” are the main objectives regarding the center early in the game. Having lines of play and coordinated piece placement is more important than whether your pawns occupy central squares. Putting pressure on the center may be more valuable than actually occupying it.

Controlling the center does not necessarily mean, “occupying” the center. It can mean being “able” to occupy the center safely, or to place pawns in such a way that they allow for better mobility. In the opening, **solid control of the center pretty much assures better mobility of the pieces and maneuverability.** Better mobility, in turn, implies better center control. If you

control the center, you can more easily send your pieces from one side to the other directly through the center. Controlling the center does not necessarily mean controlling all of the central squares (that is extremely rare). A realistic goal is to aim to control the squares that will make it possible for you to achieve your strategy.

**All of the pieces, except the rook, have more scope in the center than when they are away from the center.** So, when your pieces are centralized they become essentially more powerful. **From the center, you can transfer pieces to either wing in the smallest number of moves.** Another benefit to having your pieces in the center is the increase in their flexibility (since they have more squares available to them when they are closer to the center). Still another benefit is that you can use your control of the center to help generate a kingside attack.

Even today, in the computer age, controlling the center is still considered one of the primary objectives at the beginning of the game: “What I learned from two matches against Rybka is that the old chess laws are still in force. You should concentrate your game in the center” (GM Jaan Ehlovest, *New In Chess*, 2007/6).

The primary objective in the opening is the quick development of your pieces in the center. Having control of the center makes it easier to develop your pieces. One of the advantages of a pawn center is that it inhibits the opponent’s development of his pieces towards the center. George Koltanowski stated the general rule:

Control of the squares in front of your opponent’s pawns means the control of his position! Should such squares be on your 5th or 6th rank, then your opponent will have no way to free his game. Should such control be exercised by rooks and minor pieces, with the rooks on open files, then your opponent will be forced to assume the defensive. (George Koltanowski, *TV Chess*)

**OPEN POSITIONS:** In open positions, there is a lot of potential for piece activity. Winning the development race can give you the edge in the fight for the center. Do not let your opponent get a large lead in development. If you are castled and you are sure you can catch up in development before any harm is done, you might be able to allow your opponent a temporary lead, but doing so is risky. Ideally, you want to have the lead in development. You want to get your pieces out before he does, even if your pieces are not on the best squares. You do not want to be outnumbered when the action begins. In open games, a superficial way to form a quick judgment about a position is by merely counting the developed pieces. For all practical purposes, this method is often reasonably adequate.

**If you have a lead in development, endeavor to keep the position open** by a breakthrough in the center or by opening files and diagonals; **if it is your opponent who has the lead, keep the position closed.** This is such a logical and obvious rule that it is valid in all cases; its violation is always a bad strategical mistake. (GM Luděk Pachman, *Modern Chess Strategy*)

**CLOSED POSITIONS:** In closed positions, the blocked center is more resistant to attack. This decreases the possibility of a breakthrough, so you have more time to find the ideal squares for your pieces. When the center is blocked with pawns (and you have no serious weaknesses), a development disadvantage will not destroy you. **A lead in development is less important in closed positions** and, therefore, you can often develop slower (with the idea of finding the most strategically correct position for the pieces). Instead of rushing to occupy a post quickly, maneuvering is more characteristic of closed positions. Placing pawns and pieces on the strategically optimum squares is more significant than how many pieces are developed and how fast they are developed.

**SEMI-OPEN POSITIONS/SEMI-CLOSED POSITIONS:** Semi-open positions/ semi-closed positions share qualities of both types of positions (open and closed). Most centers are not perfectly open or closed, so most openings have characteristics from both types.

## DEVELOPMENT

It has been said, “No development is better than bad development.” Of course, do not take this too literally. **Develop thoughtfully, meaningfully and purposefully.** Sound development imparts many advantages. “Positional advantage, the initiative and the attack with sacrifices in the opening stage—all of this comes as a consequence of better development” (Leonid Shamkovich, *Chess Sacrifices*).

**An advantage in development leads to other advantages.** Frequently an advantage in development will present the better-developed side with winning combination opportunities. Better development can help prepare you for attack. At the same time, you will not have to fear an attack from your lesser-developed opponent. If nothing else, your superior development can be worrisome for your opponent.

Be wary of any moves that you make in the opening that are not developing moves. One exception would be if your move forces your opponent to make a move that is not a developing move. “A very sound maxim is that **non-developing moves should be avoided if possible in the opening**” (Raymond Keene, *Keene on Chess*).

Of course, if your opponent has made a weak move or allowed some opportunity that must be capitalized on immediately, you can temporarily ignore the principle of rapid development. At that point, the focus of the game is on taking advantage of the opponent’s mistake. “It is precisely a tactical refutation, based on the dynamic features of a position, which must be feared



by a player seeking positional or material advantages at the expense of development” (Alekseï Suétin, *Modern Chess Opening Theory*).

You do not want to leave the opening with bad or deficient development. You will need good development as a foundation for starting to mix it up later in the middlegame. Useful development is mandatory for the makings of a sound attack, as well as for a solid defense. It is not enough to develop the pieces quickly and gain control of the center. It is necessary to do all of this within the context of a general plan.

Develop aggressively if possible, but always be aware of the basic principles as you do. **Disregarding opening principles (particularly those regarding development), can be dangerous.** This is especially true when there is an early skirmish... you might not be ready for it.

One way of looking at chess development is to regard it as a fight for freedom. You want to have at least as much action for your pieces as your opponent has for his. Recognition of this should lift a player above much useless detail, just if he had vision, from an airplane, of a crowded town. (Gerald Abrahams, *Technique in Chess*)

An undeveloped piece contributes nothing to attack and little, if anything, to defense. **An undeveloped piece is comparable to being a piece down.** If one player has five pieces developed, and the other only three, for most practical purposes, the second player is two pieces down.

Even in the middlegame, development continues to be of major importance. Always consider development when trying to solve problems. If nothing else, improve the position of your worst piece.

## **PIECES:**

Speed: In closed positions, a delay in the development of the pieces is often

feasible because the opponent's pieces cannot penetrate into your position, but in most cases the basic aim of piece development is to rapidly develop all of your pieces to their most powerful and effective squares while simultaneously taking control of the center. You should try to develop to the point of readiness in as few moves as you can. If it has taken you more than about 15 moves to develop all of your pieces, you are probably developing too slowly.

Rudolf Spielmann estimated **the value of development to be worth about one pawn for three developing moves**. Development, in many ways, is a race, but speed of development is not the only principle of development: **You must always look for the best move, even if that means moving a piece two or three times**. Try to develop a piece to its optimal square as swiftly as possible. There are other factors to consider (such as the coordination of the pieces, the strategy of the development, and the overall structure). **“The main principle of development is economy of time”** (Emanuel Lasker, *How to Play Chess*).

Order: Which piece should you develop first? If you have a piece that only has one clearly good location to go to, move that piece first; the next move your opponent makes might help you to decide where to put the other pieces. If you do not have such a piece (in other words, no piece has an obvious “best” destination), then move the piece that “seems” to have the best placement (even though it may not be “clearly” the best) between the candidates. If one piece does not seem to have a clearly better destination than the other choices, then move the piece that leaves you with the most options after making the move.

You will usually want to develop the pieces first that are on the side on which you are going to castle. If you know which way you are going to castle, you should develop the pieces on that side first. Since most of the time you will castle kingside, you should usually develop your kingside pieces first. In most openings, kingside castling is obligatory. If so, you should do it early.

Position: You need to develop your pieces in order to prepare your army for the coming action. Since all of the pieces, except the rook, have more range nearer the center (and, therefore, more influence than from their original squares); develop them in order to increase their power. At the same time, keep the following in mind: piece coordination, the occupation of space and control over key squares.

In developing your pieces, you must try to get them to their best squares. **Each piece has an optimum placement** and, possibly, a few other “next best” positions. It is essential to figure out where these posts are, as early as possible, and to try to locate your pieces accordingly. Sometimes, although rarely, there is not a better position for a piece (especially a major piece) than its original square, in which case you can leave it there and consider it to be developed.

Avoid developing pieces to bad squares where the piece is out of play or can be attacked by enemy pawns or pieces of lower value (unless such an attack would result in a weakening of your opponent’s position). Being forced to move the piece again might cause loss of time for you or contribute to your opponent’s development. Develop flexibly. Avoid developing a piece to where it hinders the development of one of your other pieces or pawns. **The weak placement of even just one piece can spoil the coordination of all of the pieces.**

Purpose: Develop purposefully. Try to seize the initiative, control the center, and develop with threats. Try to control the board and to **make gains with each move**. To meet your threats or to fight for control and initiative, your opponent has to ignore his own plans for the moment and lose some time in the process. **Do not start making intricate plans in the opening phase. Get your pieces developed.** “Undeveloped pieces are not working pieces. To paraphrase a popular expression: if they’re not part of the solution, they’re part of the problem” (Sammy Reshevsky, *The Art of Positional Play*).

Of the moves available to each player in the opening, only a few need be

devoted to the aim of efficient gain of space and control of the center to create the necessary conditions for maximum activity of the pieces. The other moves in the opening stage should be used to move all the pieces into conflict with the enemy in the minimum time. (Svetozar Gligorić, *How to Open a Chess Game*)

Limit opponent: Limiting what your opponent can do is as important as developing your pieces to prepare for an attack; sometimes, it is even more important than development. It is also important not to make a move or a capture that helps your opponent to develop, or forces him to go to a good square. Restricting your opponent's development can often give you enough time to prepare an attack. **“The master chess player is as much concerned with the prevention of his opponent's development as he is with the completion of his own”** (Irving Chernev, *The Most Instructive Games of Chess Ever Played*).

You have to contest all open lines. Do not voluntarily give up any open files, ranks or diagonals. Develop your pieces so that, if the opponent breaks through in the center, your pieces will be useful. Getting the pieces out is only part of the goal of development. You must develop the pieces intelligently, and in accordance with the demands of the position. It might be better not to develop a piece at all than to put it on the wrong square.

Once: Try to move a piece only one time in the opening until all the other pieces have been developed. If you need to move a piece a second time (before the other pieces have been developed), it is probably a sign that something is wrong with your strategy. You can make exceptions:

- to meet a threat
- if there is a tactical or positional reason
- it is forced
- if your opponent has moved a piece twice (or otherwise lost a tempo)

- to gain or preserve the initiative
- if the move creates a threat that forces your opponent to reciprocate by wasting a tempo to defend

In addition, moving a piece a second time might be justified to win material. **“Even the strongest players sometimes overlook the idea of moving the same piece twice in the opening”** (Asa Hoffmann, *Squares*, Winter 2003).

Develop a piece to a good square instead of grabbing any reasonable location. **One piece, well located, might be worth two poorly positioned pieces.** That means that it might be worth moving a piece twice if by doing so it achieves a strong position or punishes your opponent for inaccurate play. If your opponent makes an error in the opening, or moves a piece twice himself, you might be able to find a tactical way to develop a safe attack, even if you have not finished your development.

Another exception is that **you may move a knight twice if the second move is to a central location** (since the piece could not have gotten there in one move anyway). Even so, it can be a good idea to wait until you develop most of the other pieces before moving it twice.

Quick development does not always mean that it is good. It is possible to move a piece in one move to a wrong place, and in 2 or 3 moves to a good place. So strive to develop the pieces to their optimal places as soon as possible. Even if this takes not one, move but, say, two, three or four. It is better for a piece to get to a good square (ensuring active, many-sided moves) in several moves than to develop it in one move to a bad square from which it will have to move later on. (András Mészáros, *Traps in the Opening*)

Minor pieces: Develop the minor pieces before the major pieces. Moreover,

do not retreat a well-developed piece unless there is a good reason to do so.

*Knights:* Most often, the knights should go to B3, but if they cannot go there, or they would be more useful on another square, develop them almost anywhere. At least try to get them off the back rank. **In double d-pawn openings, avoid putting your knight in front of the c-pawn.**

Develop knights before bishops for three reasons: they are slower than bishops are; you often have a better idea where the knight should go, and because the bishop has more options than the knight does. The saying, which can be traced to both Lasker and Steinitz, **“knights before bishops,” does not necessarily mean that you should develop both knights and then both bishops. It means KN before KB and QN before QB.** Additionally, Capablanca said that you should develop at least one knight before developing a bishop. This is not to say that you “should not” develop both knights before developing both bishops (in fact, in many book openings you do develop both knights first). The point is that, generally, you should develop the KN before KB and the QN before QB.

*Bishops:* You should develop the bishop from the side that you are going to castle on before developing the other one. Try to put your bishops on open diagonals or put them where diagonals are likely to open. A bishop should not go to b5 or g5 unless with check or there is a target piece to attack. Otherwise, the bishop itself can be subject to attack. **Only play your bishop to b5 or g5 (even if there is a target piece) if you are willing to exchange** (or your opponent cannot break the pin), since after a6 or h6 you might have to exchange or lose a tempo. In addition, as Lasker advised, **you should not pin a KN to the queen before your opponent has castled**, especially in double KP openings.

When your opponent has played P-K4, moving your king’s bishop to QB4 is often good. On the other hand, if he has played P-K3 instead, the move B-QB4 is often weak.

The queenside bishop is the last minor piece developed in many openings. Lasker recommended that a player not develop his queen bishop until his opponent had castled.

**It is weak for white to play Bd2 in about any opening**, unless there is a tactical justification. It is sometimes best to leave it on its original square.

You may occasionally see strong players retreat their bishops to base, having first brought out their rooks. As bishops are long-range pieces, they can of course rest on one side of the board and still have an influence on the other. (Chris Ward, *Improve Your Opening Play*)

Queens: Develop the queen after the minor pieces. Do not make early queen moves, especially if your queen can be subject to attack. Without the assistance of the other pieces, the queen is often unable to attack and becomes a target. It also stands well right where it is at the early part of the game and, until the general position starts to come into focus, there is no good reason to move it. In fact, if you need to move the queen early, it is often a sign that you have already made a mistake.

Then again, do not leave the queen out of your development plans. It is the most powerful piece. Where you develop the queen to can have a major impact on the overall success of your development, and, as a result, can often significantly influence the game. Another reason for developing the queen is to “connect” the rooks. In most cases, develop the queen close to its origin (for example, QB2, Q2 or K2) in order to minimize its exposure to being attacked by pawns and pieces. It is not advisable to move the queen to the b-file early in the opening unless it threatens something. You should also avoid developing the queen to a file that is likely to open. Developing the queen with the idea of going pawn hunting or for premature attacks can be dangerous. **If you are far ahead in development, most often, you should not exchange queens.**

Pawn Obstruction: Usually, the **pieces belong behind pawns** (instead of in

front of them). For instance, you should not develop a bishop to Q3 before the queen pawn has moved to Q4 (so as not to block the queen pawn from going to Q4). “Philidor’s ancient principle that **the c- and f-pawns should not be obstructed** still holds in most positions” (Cecil Purdy, C.J.S. *Purdy’s Fine Art of Chess Annotation*).

Rooks: In general, the model development plan is to move all of the pieces off the back rank and to castle so that the rooks are connected. The connecting of the rooks is a sign that the opening has been completed and the middlegame has started. Try to get your rooks into the game within the first ten moves or so. When the rooks are connected, they should come to the center or find open files to use (especially central ones). If there are no open files, place the rooks on semi-open files or, if there are no semi-open files, they belong on files that are most likely to open. If none of these conditions exists, bring the rooks to bear on the center files. If there are not any open files for the rooks, it can be reasonable to delay the centralization of the rooks and, instead, make some other useful move.

Alternatively, especially in the case of opposite-side castling, you can place rooks behind pawns that you plan to push. Keep in mind that many times you can develop rooks behind an advanced rook-pawn and then bring them across to the center. When you need help deciding which rook to move, **move the one that is doing the least and the one that will leave the other rook with the most mobility after the move**. The castled rook is already in play, to some extent, and is closer to the center than the other (undeveloped) rook. Because of this, usually, after castling, you should move the other (uncastled) rook first. Managing your rooks well can win you the opening.

Evaluation: In the opening, it is useful to compare your development with your opponent’s development. A simple way to do that is to count the number of pieces off the first rank plus any developing moves on the rank (such as castling, or a rook moved to the center). Another way to compare your opening



development with your opponent's is to count the number of moves that it would take to get to the position on the board (when it is white on the move).

Of course, your overall assessment will still have to include pawn moves, pawn structure and the actual effectiveness of the development. "Mechanical calculation of development tempi is, in itself, not a suitable measure for deciding who has the advantage; the real meaning of piece development lies in the achievement of the maximum power for the pieces" (GM Luděk Pachman, *Modern Chess Strategy*).

Lead: The lead in piece development in the opening can fluctuate because of taking time to make a pawn move, moving a piece more than once, or from combinations and exchanges. The lead normally changes hands several times during the opening phase. A lead of just one piece in development is not permanent; it is temporary and dynamic. **A lead of two or more pieces can be significant.** If you are far enough ahead in development, it is possible for you to be in your middlegame while your opponent is still in his opening and still trying to complete his development. **A lead of three moves in development can be a decisive advantage.**

**A lead in development is more important in open positions than in closed positions** because, if the position is open, you will have the best chance for your pieces to infiltrate into your opponent's position. **With a lead in development, you should try to open lines.** If you have a lead in development in an open position keep the pressure on your opponent. Do not let up.

If your opponent has some pieces on their original squares and you are fully developed, keep your opponent busy by sharp, forceful play. Keep him engaged by making threats and by attacking, even sacrificing. Keep the initiative and try to keep him from developing, because the lead in development is temporary. It might only last for a few moves. Use it or lose it! Seizing or retaining the initiative does not always have to involve sacrifices.

You should only make use of sacrifices when they are necessary and correct.

Try to develop further improvements or start an attack. **Use your lead to generate a more permanent advantage** (for example, provoke a pawn structure weakness, get the bishop pair, or win the exchange). **Exploit a significant lead in development right away.** When you are better developed and your pieces are more active, you should try to exploit these advantages immediately because they are temporary. Try to convert these advantages to a long-term strategic advantage, something more concrete or lasting (such as material gain or a structural advantage) before your opponent catches up in development.

If your opponent has a strong center, and you have a lead in development, it is important that you take advantage of your lead before your opponent can consolidate his position. If you are better developed than your opponent is, and you have an open position, or even a semi-open position, you have, at least, some of the prerequisites for an attack. **You should attack before your opponent has time to catch up with his development.**

Behind: If you are behind in development, you should not try to grab pawns. When you are behind in development, try to keep the position from opening up. If you have a solid position and you are slightly behind in development, you should be able to catch up. With temporary slight advantages, there is a natural tendency for the position to balance (as long as there are no long-term weaknesses) rather than to worsen.

Harmony/Coordination: When you develop your pieces, keep the purposeful coordination of those pieces in mind. Develop them harmoniously with each other with an eye towards their future cooperation. Make sure the pieces work together in attack, defense, and help (not hinder) each other. Do not develop your pieces to posts that can cause them to get in each other's way. The pieces should form a "whole" which can act as a unit and can support each other. Use all of the pieces and consider the whole board (not just one side). Something to

consider, when deciding what piece to move, is how to improve the position of your worst piece.

### **PAWN MOVES:**

Priority: The power of a pawn is weak compared to that of a piece; so, for that reason, among others, **developing pieces is a higher priority than moving pawns**. Every pawn move uses a tempo that could have been used to develop a piece. Make early pawn moves in order to free the pieces. Your central pawns also act as a shield to help keep your pieces from being driven back by the opponent's pawns. In general, you should only make pawn moves in the opening if they assist in the construction of the center or assault the opponent's center. You should avoid advancing center pawns beyond the fourth rank during the opening. They can become weak if pushed too early.

Developing: Most authorities would say that pawn moves are not developing moves; they only aid the development. On the other hand, you can argue that you can consider some pawn moves to be developing moves, in a sense, since they make it possible for you to develop your pieces.

When: Other than for purposes of freeing the pieces and necessary defensive tactics, **make early pawn moves only when the move in some way influences control of the center in a positive way**; either by directly occupying the center or by making a piece attack on the center possible. If you can make a pawn move that forces a knight off a central post, it is probably good to do it (especially if it helps reinforce your center while not creating a significant weakness). Sometimes, an early pawn move can be an essential part of a valid plan. There are also times when a useful "waiting move," such as a3 or h3, can compel the opponent to give back a tempo (as in the Queen's Gambit when white would like to recapture the c4 pawn in one bishop move).

Not many: Make only enough pawn moves to free the pieces and to form a center. Excessive pawn moves can waste precious time. As a result, keep them

to a minimum. How many pawn moves should you make in the opening? Too few moves and you do not gain enough space and mobility, too many and you waste time and weaken your position. You should probably move more than two pawns, but six is likely too many. **“A good rule of thumb is that you should not make more than three pawn moves in the first eight moves”** (John Nunn, *Understanding Chess Move by Move*).

Obstructing: Do not make a pawn move that blocks one of your pieces from going to a good post. For example, do not play e3 or d3 before developing the corresponding bishop; do not block your c-pawn from advancing by playing Nc3 in double d-pawn openings.

Color: Be careful not to move your pawns in such a way as to create a color complex weakness (by having several pawns in one area all on the same color). When you make a move to allow a bishop to pass, do not move another pawn from the same color in the same area. For example, if you make the move g3 (to free the f1 bishop), be wary of making the move e3, which would create a white color weakness. If you do make the g3 move, you should usually move the bishop to g2 immediately after the move g3 to help lessen the color weakness.

Lines: You should not make captures that open lines for enemy pieces until all of your pieces are developed. However, if you have the better development, to take advantage of the lead you should open lines for your pieces. In fact, if you are unable to open the position, your lead will not be of any value.

Castled: Try to avoid pushing pawns unnecessarily in front of your castled king. **The most important pawn in front of your kingside castled king is the g-pawn.** Exchanging it for the f- or h-pawn is, usually, not a good idea.

h3: **It is not usually a good idea to make the h3 (or h6) move just to prevent a possible bishop pin on g4,** especially if your opponent has another good developing location for the pinning piece. In this case, your h3 move would then be a waste of time, as well as causing a weakness and a target in your pawn structure, and it does not add to your development. The bishop

move to h5 (after it is attacked with h3) should not be thought of as a retreating move either. The bishop is still on the diagonal. There are times, though, when making the pawn move h3 can be useful. For example, to prevent a knight from coming to g4 to harass a bishop that you want to locate on e3, or to make a “luft” for the king in some situations.

f3: Sometimes, you can make the, often weakening, pawn move f3 in the opening instead of developing a piece. The move is part of several “book” openings as well as often being useful when white wants to control e4. Making the move f3 for the sole purpose of defending e4 is risky with your opponent’s queen on the board, though, because of the potential for queen checks. That is why, **if you play f3, it is a good idea not to play it until your opponent’s queen is gone, or you have castled long.** The move is also potentially a loss of tempo as well as probably being somewhat positionally unsound (since f3 is often the best square for the king knight).

Tempo: Tempo is important in the opening. Knowing how to play the opening wisely is largely based upon the efficient use of time.

Time (or tempo) is the unit of the move—it is the element of tactics. **The move is so vital that if a player with only mediocre ability were granted the right to move twice in a row, at his option, just once every game, he could become World Champion!** (Larry Evans, *New Ideas in Chess*)

Value: A tempo does not have a fixed value, but it can be approximated. A tempo in the opening is worth about a half a pawn (some say, a third of a pawn). Another way to state that is that **the loss or gain of two or three tempos is worth a pawn.** That being the case, if you get two extra developing moves for a gambited pawn, then you have a good chance of being able to transform your lead in development into a more permanent form of compensation, or at least to get back the sacrificed material.

As with most principles, this is an inexact estimate. One reason it is inexact is that pawns themselves vary in value. In open positions a tempo is usually important, in closed positions it often means little and a delay in development is often affordable. In sharp positions or later in the game (after the pieces have been developed), or in the endgame, a tempo can mean the whole game. This is another way of saying that **a tempo becomes more important later in the game**. An easy way to see this is if you were to allow your opponent an extra move at anytime during the game, those odds would certainly be worth way more than a half of a pawn.

In symmetrical positions, a single tempo can decide the game. In these positions, the first player to get the initiative will most often force his opponent into long-lasting passivity.

Loss: A loss of a tempo is not always crucial, as it can result from a necessary or prudent pawn move (such as gaining control over vital positions). The idea, though, is not to lose time in the opening. Think of each move as a chance to gain control over more squares. One way to lose a tempo is by moving a piece twice in the opening. If the second move of a piece is to undevelop it (rather than to improve its position) then it might even cost you two tempos (since you will need to move it again later to redevelop it).

The loss of time is so crucial in the opening that it might even be better to play a chancy or uncertain move rather than to “undevelop” a developed piece. Another way to lose time in the opening can be from trying to start an attack before completing your development.

Gain: If your opponent makes a bad or weak move in the opening, sometimes a time-gaining combination presents itself. If you can develop a piece with a threat, you can often gain time. If your opponent makes a time-losing move, though, exploit it immediately.

Conversion: When pieces are exchanged, their past moves are exchanged (or cashed in). For example, when a piece that has moved two times is traded

for a piece that has moved four times, the owner of the latter has lost two tempos. That is why Nimzovich urged to **“exchange with resulting gain of tempo.”**

## CASTLING

**WHY CASTLE:** Castling is arguably the most important move in the game of chess. Castling is the only time you can move two pieces in one move. It gets your king away from the center to relative safety, it brings a major piece to the center, and it allows the rooks to be connected. This is why Alekhine said that castling was “an attacking move!” ...because the rooks now can get into the game.

To combine and paraphrase a few similar famous old quotes: “You should castle because you want to or because you need to, but not because you can.”

**WHEN TO CASTLE:** Generally, you should castle early, especially if the game is at all open (in closed games, castling early is often not necessary). By having a safe king, you are at liberty to go about your plans (without worrying about being mated in the center). Instead of castling automatically, though, if there is something more urgent that you should do defensively or offensively, do it. You should not castle mechanically. If there is something that you need to do, it is probably okay to do it first. When you are not sure whether to castle or not, you should castle. It is probably the right move. Be sure not to castle into an attack. Delaying castling for too long can have a high price tag and can be a risky policy, but castling too soon can also be bad.

**If you have a lead in development (even if by virtue of being white), you can often put off castling a little longer than your opponent does.** The defending (or black) side will usually find castling to be a little more urgent. If you are defending and it is possible that you will castle on opposite sides, you might wait for your opponent to castle first. These are exceptions, though;

most of the time early castling is better than delayed castling.

**If the queens are off the board, castling is not always necessary.** It might still be a good idea, but it is not quite as important as when the queens are still on the board. Aiming for the exchange of queens (and maybe even some minor pieces) might enable you to delay or forego castling entirely.

**KING SAFETY:** The safety of the king is the most important prerequisite of the game. Unless you have good compensation (such as the initiative, material, or development) or a position that cannot be exploited, a weak location of the king can be a crucial defect.

King safety is not as crucial in the early opening stage of the game because the opponent's pieces are not developed enough to pose a threat. But, as soon **as your opponent gets an advantage in the center, the game opens up, or he has a lead in development, king safety becomes extremely important.** "The two most important questions to ask yourself before castling are: 1) where is my opponent going to put his king? 2) what kind of shape are the pawns that will shield the kings?" (John Greco, *The Chess Tactician's Handbook*).

Regardless of where it is placed, **the king is nearly always safest near the pawns** (usually behind them, but sometimes even in front of them). Avoid weaknesses in front of your castled king. Ideally, you should try to keep the original pawns in front of your castled king as long as you can. This setup yields the maximum pawn protection of the squares nearest the king. It also makes it the most resistant to a hostile assault on your pawn front by enemy pawns. Any movement of your pawns in front of the castled king can also create targets for your opponent. Therefore, they should remain unmoved unless it becomes necessary or advantageous to move them. **If you have a choice, but can only have one pawn in front of your king, the best one for king safety is the knight-pawn** (the g- or b-pawn).

**Keep some pieces near the king to help with its defense. Yet, defend the area with the minimum number of pieces that are necessary.** That way



you will have more pieces available for offensive purposes elsewhere. Be careful, though, not to short-change your defense by doing so; the king's safety is crucial.

**DELAYED CASTLING:** Normally, you should get your king safely castled as soon as possible. Delaying castling is a complicated and risky matter, but sometimes you need to delay castling in order to see what your opponent is trying to do. One reason to delay is to wait long enough to get a good feel for the true nature of the position. For example, you might want to wait for your opponent to commit his king (which might create a target for you or limit his attacking resources), or wait until it is clear whether to even castle at all and, if so, on what side. If your opponent is ideally positioned for an attack on the side you plan to castle to, you might want to delay castling (or change plans and castle on the other side).

If the center is permanently blocked (there is no straightforward way for your opponent to break through the center), you might postpone or even forego castling altogether. **The king is often even safer in the center when the center is permanently blocked.**

The king can often be better placed in the center if the game is already heading for an endgame (especially if the queens are off). Other reasons for delaying castling might include:

- Getting the initiative
- obtaining a positional advantage
- to follow another objective such as gaining material
- to provoke a premature attack by your opponent (possibly for the purpose of causing a static weakness)
- to avoid castling into a worse position (possibly directly into an attack)

There are times when you can prepare for castling, but delay actually doing it until it becomes necessary. Sometimes, castling in a sharp position can

be too slow. It can often be more effective in these cases to delay the castling and continue developing. “Increasingly, players in dynamic positions keep their kings in the center and even neglect their development to achieve concrete tactical and position goals” (John Watson, *Secrets of Modern Chess Strategy*).

**CASTLING IN OPEN POSITIONS:** In open positions, especially when you are behind in development, king safety is of the utmost importance. Most of the time, the king is unsafe in the center when the position is open. In an open position, there is a better chance for power strikes toward your uncastled king through the open files and diagonals than when the king is castled. When in the center, the king can be attacked from three directions. By castling, the king gets further away from the power strikes and cuts the potential directions of attack from three to two. In open positions, you should castle immediately unless there is a pressing reason not to. Pawn-grabbing and trying to hold on to gambit pawns, for example, are often too risky.

Castling also gets a rook closer to the center. Getting the rook to the center in an open position can have the added benefit of getting the rooks onto open central files (since the position is by definition “open”). Getting a rook to the center can be especially strong if the opponent’s king is still uncastled.

**Early castling is more often done by black than white.** This is because white sometimes wants to delay castling because he wants to use his extra move to start concrete action or because he is not yet sure which side to castle on.

**CASTLING IN CLOSED POSITIONS:** If there are no central lines or lines open toward the center, the king can usually remain relatively safe there. You still might want to castle early to free the rook, if for no other reason. Be aware too, especially if your opponent is ahead in development, that positions that appear to be closed can sometimes be opened up.

**KING CAUGHT IN CENTER:** It is usually worth some material (generally a

pawn or more) in the opening to keep the enemy king in the center, especially if you also have the initiative. The king in the center is more susceptible to attack. When your opponent is occupied with the defense of his king, his chances for preparing his own attack are much lower.

**OPPOSITE-SIDE:** Opposite-side castling, as a rule, leads to a sharp game. This is because both sides are able to advance their pawns against the enemy without regard to the pawn defense of their own position. **When castled on opposite sides, one of the main ideas is to open a file. If the queens are still on the board, you should castle on opposite sides only if you are sure that your attack will beat your opponent's attack.** If you are not prepared for a sharp struggle, or you will not win the pawn race, you should consider delaying castling until your opponent commits... and then castle on the same side as him.

**If you have won a pawn in the opening, it is often better to castle on the same side as your opponent.** There is no sense complicating matters. On the other hand, if you have lost a pawn, castling on opposite sides might give you counterplay that might overshadow the loss of the pawn.

**If you have something in your pawn structure for the opponent to capitalize on (such as a pawn on h3 or h6), it can be risky to castle on opposite sides.** That pawn can be attacked to rip open your pawn shield and leave you vulnerable to attack.

**When castled on opposite sides, the side castled kingside usually has a slight edge** because his king is a little safer (being further away from the center) and often the player who has castled queenside is subject to a loss of a tempo from a check along the c1-h6 diagonal. The player castled queenside may also lose a tempo by taking the time to move the king to a safer position (at b1 or b8). Queenside castling is usually bad in certain openings (such as the Ruy Lopez), but it can be customary in others (for example, some variations of the Sicilian Defense).

**LONG VS. SHORT:** Generally, kingside castling affords more king safety than does queenside castling. The king is usually safer on g1 than on c1. In the upper levels of chess, kingside castling is more common than queenside castling (for both white and black). **Grandmasters castle about 90% of the time. Moreover, when they castle, about 90% of the time they castle on the kingside.** One of the reasons for this is that it takes longer to clear out the three queenside pieces to make castling possible instead of the two pieces that are necessary for kingside castling. The extra piece to be moved is the queen and, this early in the game, the best placement for the queen is often not yet apparent. There are also more squares to protect in front of the king castled queenside than for the king castled kingside. In addition, as said before, if the d-pawn has been pushed (as it often has, in order to let out the bishop); the king at c1 is on an open diagonal and subject to checks.

With queenside castling, the a-pawn is unprotected, and moving the king to b1 to protect it costs a tempo (or in most cases, returns the tempo gained by saving the tempo that would have been used to move the rook to the center in the first place). In addition, although generally a minor consideration, the king moving to b1 removes a defender from the QR. On the positive side, castling long brings a rook to the center immediately, sometimes with great tactical power. Overall, when the rook on d1 is a sound idea, queenside castling can be an excellent choice.

Queenside castling is usually a more aggressive move, but riskier. Sometimes, you might consider castling on opposite sides, even if your position is inferior, because of the wildness of it; it might create chances for you. On the other hand, if your position is better, you might want to castle on the same side to rule out those same wild chances. Often, the resulting sharp game that you might get from opposite-side castling can cancel out a material advantage.

Opposite-side castling is especially dangerous if there are any defects in your pawn structure in front of your king. For that reason, it is usually safer to

castle on the side on which the pawns have not been moved.

Another factor in deciding which side to castle on is the focus of enemy pieces. You do not usually want to castle into the line of fire of the opponent's pieces. The mere presence of more material on one side or the other should have an impact on the choice of where to castle.

## OPENING STRATEGIES

**BASIC:** The basic opening strategy is to develop your pieces in a coordinated way, gain control in the center with your pawns, castle (or otherwise safeguard your king), connect your rooks, and aim towards the middlegame (with an eye on the endgame). You should do all this with as clear and concrete of a goal as possible in mind, in a clear, aggressive, yet safe and simple way while employing economy, logic and flexibility. You should always be alert for the opportunity to exploit your opponent's errors or any imbalances that develop (or you are wise enough to cultivate) along the way.

It is easy to get a cramped and passive position if you think of development alone without having a plan. Apart from following the known strategies associated with various openings, after the first 6–8 moves of the game, try to form a plan. In the first few moves, attempt to find some focal point around which to build that plan. If your opponent provides something by way of a mistake or a weak move, that might give you the basis for a plan. Sometimes, you might have to probe and provoke to create a weakness to use as the center of attention of your plan. While you are doing all of this, do not forget to be aware of your opponent's attempts to do the same to you.

**A good plan is more vital in modern opening play than are positionally sound structures.** Play the opening based on a well-thought-out plan. Further, if you can create a situation where there is only one clear-cut strategic path (and you know what it is), you will have a big edge over your opponent. It is important to try to discern your opponent's plan and to

compare it continuously to your own plan. If, for example, his plan is too slow or becomes impractical, a change in your plan, or an acceleration of it, might make it possible for you to take advantage of the drawbacks of his plan.

**Do not get a passive position in the opening.** Develop aggressively. Create favorable imbalances in the pieces or the position, or both, and then capitalize on those imbalances.

**If your opponent makes a mistake in the opening, do not wait until you are fully developed to capitalize on it.** If the error is not taken advantage of right away, the chance might disappear.

**CHOICE OF OPENING:** As far as what kind of openings to play, the consensus seems to be that **a beginner should adopt gambit openings** so they can become familiar with playing sharp positions and gain experience with tactics early in their careers. Playing openings like the king's gambit, the Evans Gambit and the Scotch Game will help you to develop your tactical skills. You will have some exciting games and learn a lot at the same time. Then, as you become more experienced, you should gravitate towards the more solid openings. First, you can shift to the pawn structure type of openings. Then, after sufficient exposure, you can move on to Hypermodern and closed openings. Queen pawn openings, for example, are based more on positional concepts with less likelihood of tactical skirmishes than with king pawn openings. **It is good to have experience in all types of openings.** Besides, along the way, you are likely to find a style that suits you.

The right style for you will take into consideration not only your personality, but also your abilities. People tend to play chess in the style that resembles the way they live. Do you like to take risks? Are you cautious? Are you good at calculating or memorizing? Are you good at attacking, but poor at defense? If you have an aggressive personality, you will probably like the kinds of openings that lead to early clashes. More reserved people will be inclined to play less risky, more civilized openings (although, some degree of

aggressiveness is necessary in all winning chess). Once you have found a style that you like, you need to find the openings that avoid the kinds of positions you are weak at or dislike, while favoring what you are strong at and like.

When you find your opening repertoire, do not get too immersed in memorizing lines. **Mechanical learning by rote will dull your creativity.** It is much better to come up with your own opening ideas and then work out the middlegame strategies that follow from them.

Old opening systems can be a good weapon, especially against a lower-rated opponent. Whatever openings you choose, play them against everybody and anybody, even masters.

Botvinnik advised against playing the same opening variations with white that you use as black, and vice versa. That way you will not run into the problem of trying to defeat your own personal concepts.

The most complicated variations demand huge amounts of time for home analysis, time available only to professional chess players. With black, for example, your knowledge of the Najdorf Variation of the Sicilian Defense may be deficient because you could not have read all of the many technical articles on this variation; therefore, a slightly more passive defense would be an appropriate choice for the student. (Lajos Portisch, *How to Open a Chess Game*)

**VIOLATIONS:** If your opponent has not violated any opening principles, there will be nothing to take advantage of; any impulsive attempt to do so should fail. If, on the other hand, your opponent violates an opening principle without adequate justification, it usually means that you can get away with a violation of your own to refute his. In this case, a well-considered risk is justified.

**SIMPLIFICATION:** In the opening, when most of the pieces are still on the board, the positions can be among the most complicated to evaluate. There are

numerous choices in terms of plans, and many minefields through which to navigate. As a result, many of the top players in the past (Capablanca, to name one) thought it was a good idea to exchange one or two pieces for the sake of simplification.

## GAMBITS

In the days of Morphy and Anderssen (the 19<sup>th</sup> century), gambits were the rage. Little was known about defense, so both sides attacked, often by way of a gambit opening. In those days, it was a sign of a character weakness to decline a gambit. Games resulting from gambit openings are often exciting. These attitudes contributed towards the popularity of gambit openings.

Today, gambit openings are still played, but not with anywhere near the frequency at the top levels as they were 10–12 decades ago. “Gambit variations are employed not just in the old romantic openings, at times they are used in popular opening systems, where material sacrifice is associated with the objective of seizing the initiative” (Gennady Nesis, *Tactical Chess Exchanges*).

Most gambits have not been refuted; in fact, many of them have been improved substantially. They have diminished in popularity partly because defensive techniques have improved and because attitudes about accepting a sound gambit have changed. These days, there is no moral obligation to accept a gambit. Another reason they are played less often these days is that, by returning the gambited material (which is a more modern technique), often the tension is released and the resulting position is often too quiet for the gambit player’s taste.

**So, should we still play gambits today? Most authorities say, “Yes.” Gambit openings are fertile grounds for tactical skirmishes. It is a good way to get practice with tactics and combinations.**

Playing gambits, helps shape the chess player’s character, teaching him to



understand the dynamics of play, and not to fear giving up material. Only by playing gambits will the chess player begin to understand that getting active positions, with the possibility of landing combinative shots will compensate him for the material sacrificed. (Yakov Estrin, *Gambits*)

**WHY:** There are many reasons to play gambit openings or to gambit something in the opening. It might be to gain a lead in development (the most common reason), or to gain control of the center. It might be to refute your opponent's over-aggressiveness when a passive move might not be enough. You might play a gambit for psychological reasons (whether to put your opponent into the kind of position he does not like, to turn the game toward your strengths, or to try to intimidate him). You might play a gambit with the idea of getting a piece to a strong position (like a rook on the seventh or a strong knight outpost). Another reason for playing a gambit would be to get the initiative. You might even play an opening gambit for fun, practice or for psychological effect.

Beginners are encouraged to try gambits to help them learn about attacking, getting and using the initiative, and the value of development.

Gambits are able to teach the beginner such basic ideas as space, material, advantage in development, open lines and diagonals, etc. They are most suitable in developing combinational ability as well as teaching exact calculation of variations as even the smallest mistake can lead to defeat. Subsequently, those aiming to reach a higher level of play must of course also learn the subtleties of positional play. But the chessplayer who has never played gambits and never risked anything, will never be a really good player! (József Pálkövi, *Morra Gambit*)

The psychological effect of a surprise gambit can be powerful. **Even if the gambit is unsound, your opponent might not find the refutation over the**

**board.** “In the laboratory, the gambits all test unfavorably, but the old rule wears well that **all gambits are sound over the board**” (William Ewart Napier, *Paul Morphy and the Golden Age of Chess*). Tal might have agreed. **The gambit openings that are based on a solid positional foundation are as sound as any other opening.**

The initiative is a big factor in modern chess. Many popular modern opening variations employ the gambit in order to get the initiative. The initiative is especially forceful in open positions when your opponent’s king is caught in the center or exposed, or when your opponent has any kind of weakness.

An initiative that results from a gambit tends to be easier to play, not least because the material imbalance injects the game with a sense of urgency that is impossible to ignore. The attraction of winning a pawn or two tempts the defender into making concessions that otherwise he might not have contemplated, thus adding weight to the initiative. (Angus Dunnington, *Gambit Play*)

Another reason for playing a gambit might be to improve your chances of outplaying a weaker player.

**A little imbalance, such as that generated by a sensible gambit, will allow the more skilful player to prevail,** whereas a position which is very quiet and level will tend to be more drawish (the weaker player’s inaccuracies may not be sufficient to cost the game), while a very wild position will tend to lead to more random results (decided by both sides’ lucky or unlucky guesses). (Graham Burgess, *Gambits*)

**WHEN:** In open positions, when your opponent has a weakness or an attack on his king is possible, consider a gambit that leads to an advantage in development. **As soon as you gain a lead in development, look for the**

**possibility of playing a gambit.** You can find gambit prospects in any opening variation, even the most passive and solid ones.

To be correct, an opening gambit should accomplish at least one of the following:

- produce a lead in time and development
- gain the initiative
- gain control of the center
- develop an attack
- prevent your opponent from castling
- interfere with your opponent's plans and position
- create pressure against a weak point in the opponent's position
- decoy the opponent's queen to a poor location
- make possible the occupation of a key square for one of your pieces
- gain space
- get a lasting positional advantage
- launch a strategic idea into motion

Be sure you have at least one or more of the above forms of compensation for the gambit (the more compensation the better).

If you do not find a way to convert your advantage in development into some kind of concrete advantage, your opponent might survive and end up pocketing the gambited material. Temporary advantages, such as control of the center and better development, will tend to dissipate. **If you do not convert the temporary advantage into a static advantage or an attack, the gambit may prove to have been unsound** and your opponent might not only survive, but he might come out of the fray better off.

This does not necessarily mean that you have to rush the situation. "The gambiteer must be patient and should not expect immediate returns. I have learned to treat a loss of a pawn as yet another positional factor that must be

taken into the account, no more or less than the others present” (Alex Yermolinsky, *The Road to Chess Improvement*). Many times, when players play a gambit, they are so fixated with the idea of regaining their material that they fail to verify the soundness of their gambit. As a result, they often lose the advantage.

**VALUE:** There is a rule of thumb that, in the opening, in open positions (although sometimes in semi-open and closed positions), **a gambited pawn is equal to three tempi**. Even two “good” developing moves can be worth a pawn. As with all rules of thumb, there are variables that affect the rule. In this case, one variable is how sharp the position is. **In especially sharp positions, it can be worth sacrificing a piece for one tempo**. In a closed position, time is often not as valuable. In addition, this rule of thumb does not apply to multiple gambited pawns. Two pawns gambited are not equal to six tempi, for example.

GM Larry Kaufman calculated (a decade ago) that the advantage of having white is worth approximately 40 rating points. He added, in a recent email to me, “A tempo at the start is clearly worth twice the value of White, whatever that is, so 80 should be correct at the GM level.” That means, if **a pawn in the opening is worth about 2 ½ tempi, it is worth approximately 200 rating points**.

**DEFENDING:** In the old days, accepting the gambit was generally considered the best way to deal with a gambit. Nowadays, declining the gambit is often considered a practical option. **In modern chess the decision of whether to accept the gambit or not is based more on the demands of the position than it was in the past**.

If you do accept a gambit though, which is often still the best way to refute it, be prepared to give back the material gain at the right time. If a gambit is “correct” (in other words, not a mistake) the gambiteer will have gotten full compensation for the gambit, by definition. If the defender does not

have to give back the material to gain back the positional edge, then the gambit was unsound in the first place. If you give back the material, you should do it to equalize the development and, if possible, gain some kind of positional advantage at the same time. If you are defending after accepting a gambit, rapidly finish your development and do not get too aggressive too early. All the while, **be prepared to return the material at the right time for adequate compensation.**

If you accept the gambit, you need to play accurately because you will probably have given away time and the initiative, and you will probably need to defend carefully. When you return material that was originally accepted from a gambit you are probably winning a small psychological bonus at the same time. Because of returning the material, you might throw the attacker onto the defense. Besides, he played the gambit in the first place for a lofty goal, not to gain the material back.

**KING’S GAMBIT:** The great English master, Joseph Henry Blackburne (1841–1924), recommended that people play the king’s Gambit opening. Even during his heyday (the late 1800’s), the King’s Gambit was declining in popularity in the top level tournaments and matches because, as he said: “When there is a great deal at stake few players dare venture into the shoal of intricate and hazardous positions to which it gives rise” (Joseph Henry Blackburne, *Beat the Grandmasters*, Christian Kongsted). He recommended that young players should “accept the gambit and defend it in the ordinary manner, as no other opening affords greater scope for ingenuity or leads to more entertaining chess.” He went on to say, “Nothing is better calculated to improve his game than plenty of skittle or off-hand practice at this opening with a player somewhat superior to himself. When the novice can play P-KB4 with an idea in his head of what is to follow, he has begun to understand chess.”

If I call this (1. e4) the opening move for attackers, I am following an old tradition: in the nineteenth century, you played either 1. e4 e5 2 f4, a ‘real

gambit,' or 1. d4 d5 2. c4, a 'positional opening.' Even though much has changed, the more concrete 1. e4 is still considered white's most aggressive opening move. (Jan Timman, *On The Attack!!*)

The king's Gambit is not played so much at the higher levels of chess today. It has been said that the reason is not that it is unsound, but that it offers chances to both sides (something that white is not usually interested in doing). That makes it generally too risky for the pros.

**POSITIONAL:** Modern top-level players generally prefer positional gambits to wild material gambit openings. They prefer getting the potentially more long-lasting positional compensation over the more fleeting lead in development.

The idea of the positional gambit is more long-term than the gambit for development or initiative. Modern computer programs still have trouble with positional gambits because their potential payoff is usually beyond the horizon of the program. A typical positional gambit is made with the idea that the sacrificed material will not prove to be as important as the compensation of getting the superior position. **With a positional gambit, material is not sacrificed with an exact plan in mind** (to open a file, to double pawns, or to get play in any certain way); the player gambits the material without any concrete idea as to how the exact compensation will materialize. The player just knows (or hopes), either by intuition or familiarity with similar positions, that the resulting position will favor him. "When a gambit is based on positional considerations it is safe to say only that the better play will win" (Ken Smith, *Theory of the Smith-Morra Gambit in Games*).

## BOOK OPENINGS (THEORY)

Chess theory, as it relates to openings, does not mean what it first sounds like. In fact, it is an unfortunate choice for a label. It is not literally “theory” in the sense of hypothesis, conjecture, or speculation. Nor is it used to mean law, such as in the “theory” of relativity. Opening theory, in the sense used in chess, is the consensus of the experts as to the evaluation of opening lines or variations. It is more accurately the “practice” of the top masters in the world. It is about what has been played successfully and how sound the variations have been in, mostly recent, top-level play. It is what is generally accepted to be the best lines in the openings.

**UNDERSTANDING OPENINGS:** You should learn modern opening theory side by side with the study of the resulting middlegame. **It is much better to understand the moves that are being played than to have memorized variations.** “It is essential for players to *understand* the ideas behind each move. Memorizing theory is certainly not sufficient by itself. In fact, too much of it can impede the ability to think for oneself and produce fresh, original ideas” (Paul Motwani, *Chess Under The Microscope*).

One of the marks that distinguishes the opening play of the book masters from that of their less artificial colleagues is the desire and ability of the real player to innovate, while the memory banks are content to churn out what they know, rarely producing a theoretical improvement of any great significance. (David Levy, *How Fischer Plays Chess*)

Some familiarity with some basic openings is a good idea. However, you must understand why the moves are being played. Blindly punching out variations will lead you down a path to a position you do not understand. You should learn the plans and ideas of each opening that you play. Conversely, it is

also not good to try to learn the basic strategies of an opening without learning the individual variations.

Do not rely entirely on memorized variations; doing so makes for a style that is lacking in creativity and deficient in strategic vision. “Opening theory is a salvation for weak players and those who want to decide everything at home using the advice of experts and computers” (Teimour Radjabov, [Chesscafe.com](http://Chesscafe.com)).

In order to have a full grasp of what you are doing, you should have a general understanding of openings, even if they are not part of your repertoire. For as much as we study or prepare for a particular type of game, sooner or later we will be confronted with unpredictable and ever-changing situations which require us to think for ourselves. Specialized preparation is all very fine, but by cultivating a more general awareness we develop mental ‘elasticity,’ which is a fundamental requirement for a good chess player. (Stefan Djuric, Dimitri Komarov & Claudio Pantaleoni, *Chess Opening Essentials*, Vol. 1)

**IMPORTANCE OF THEORY:** These days, it might be necessary for the chess stars to be completely booked up on current opening theory and, in addition, even be doing new work with certain variations, because understanding and creativity are not enough at that level. Players from the rank of international master, and up, must keep up with the most recent theory. At least two recent World Champions are known for their victories based on their exceptional preparation aimed at obtaining a rapid initiative that leads to a brilliant middlegame (Kasparov and Topalov). For the vast majority of us, though, it is more important to be able to comprehend the fundamentals and the ideas behind the moves rather than possess a deep memory bank of current opening theory.

Too much information can even impair your ability to perform. If your



theory is strong but your chess is weak, you will still lose. Many young people, especially, tend to dedicate a lot of time to studying opening theory. They would be better off using that time to improve their overall chess ability. “In my opinion it is more important to understand tactics and the power of positional strategies than to have a massive opening repertoire” (Simon Williams, *Improve Your Attacking Chess*).

Some players think that they must find the perfect opening in order to win. However, thousands of openings are capable of getting you into a favorable position for an effective middlegame (which is the goal of the opening).

It is true that, in sharp lines, a good knowledge of theory is almost crucial (maybe decisive at the top levels) and natural moves are not always best. At the lower levels, a good understanding of opening theory (and opening knowledge in general), is important and extremely useful in chess, but it is not the sole reason for success.

Do not spend too much of your study time on openings (until you are rated over at least 1800). It would be better to use that time for studying tactics, strategy, and technique. Most games are decided in the middlegame and endgame, so that is what you should spend most of your time studying.

No reasonable opening loses (and, of course, no opening wins either). If you look into how many games are won or lost in the opening stages, you will realize that it is not many. The real factor in winning or losing, especially at the amateur level, is mistakes. **Instead of wasting time memorizing lines, try to improve your skill level by becoming well versed in tactics, positional concepts, strategy and technique.**

The stronger you are the more important opening preparation becomes. Once you’ve become a Grandmaster, you mainly study openings and prepare against the opponents that you will play, but for a club player or weaker, I wouldn’t recommend wasting much time on openings at all.

Tactics and positional understanding are the most important elements of the game. (Sofia Polgar, *interview with a grandmaster*, Aaron & Claire Summerscale)

**LEARNING OPENINGS:** To learn an opening, try to understand it first. Appreciating the ideas behind the opening is much more important than the rote memorization of its lines. Memorizing variations will not accomplish nearly as much for you as being aware of the fundamental concepts and plans of the opening line you are playing. Learn the ideas of the variation and focus on applying sound general principles.

One of many benefits to learning the strategies of an opening is that sometimes you can apply the strategical ideas of one system to another system. Consequently, by learning some opening strategies, when you find yourself in an unfamiliar opening, you occasionally might be able to transfer at least some understanding to the new setting from a similar opening.

When trying to learn a new opening, it might be a good idea to memorize the first few moves of the main line, but then spend most of your time trying to learn the common strategies and themes in that opening. Trying to memorize many long variations is unnecessary, and it can be confusing.

You also need to know why certain moves are played and why others are not. Try to learn the reason for the moves instead of trying to commit to memory the move you are “supposed” to play. It can be dangerous to play an opening by rote that you do not understand. On the other hand, if you do understand the strategies and basic aims of the opening, you will be much better prepared to meet the unexpected. If you have a move you like better than the book move, try it. If nothing else, you will find out why it is weaker (if it is).

Of course, the best of both worlds would be to have both a total recall of all the best lines and an understanding of what is going on. That would be an unbeatable combination. However, unless you are nearing the top ranks of

grandmaster, that is not likely to be an issue.

Chess theory has reached a point where words like ‘understanding’ and ‘talent’ will soon be replaced by ‘perfect analysis’ and ‘good memory.’ That day might be coming, but meanwhile we mortals should take whatever talent we have and apply it towards trying to ‘understand.’ (Veselin Topalov, *New In Chess*, 2007/7)

The evaluations and conclusions of top level players, about which lines are good and which ones are not, are likely to be extremely accurate, but you should judge for yourself what lines you want to play. You should lead your games into the kinds of positions that you understand and feel comfortable with; not a potentially superior position that you do not understand.

The huge accumulation of chess data has revolutionized the study of opening strategy. Before, you could study all of the known examples of a particular opening variation. Now, even a small part of an opening, beginning after the tenth move, may have thousands of examples. (Eric Schiller, *Learn from Garry Kasparov's Greatest Games*)

It is probably simplest to learn a small number of openings, but learn about the first 15 moves in the main variations fairly well. If you can see the game from your opponent's perspective, you are not as likely to get shocked by something you did not expect. For this reason, it is a good idea to learn how to play the opening from both sides. **Moreover, make sure you can verbalize what the main characteristics of the opening are.** That way, you will know that you actually understand it.

There is a benefit to learning (or at least gaining some familiarity) with several openings. It will add to your understanding of the game.

Anand has an amazing talent for chess; he is able to learn almost any

opening quickly and understand the essence of it. When we spoke about making progress as a chess player, he told me that he thought his most important “leap” came when he decided to learn opening system after opening system just for the benefit of learning more about chess. (Patrick Wolff, *American Chess Journal* Number 2)

While you are learning the opening, be sure to get some published master games on those openings. **Look for games with lots of annotations, especially by one of the players** involved. Studying these games along with the theory is highly recommended.

In his column: “*Sadler on Books*” in *New In Chess*, 2003/1, Matthew Sadler said “Don’t be afraid to be lazy.’ Or to be slightly more precise, ‘don’t be afraid to let other people do all the work for you!” His point was that, by playing over and studying the games of the experts of a certain opening, you can learn the move orders, the theoretical assessments, and the positional lessons of that opening. He said, “It’s as if you’re getting years of experience for free.”

**CHOICE OF OPENINGS: Deciding what openings will be part of your repertoire is important and the decision should not be made rashly. You will probably be playing these openings for many years, and you will be devoting a lot of time to studying them over the years.**

One way to find good openings for your repertoire is to **find a GM whose style you like** (or more precisely, whose style fits yours), and **then duplicate that player’s repertoire**. You should like the choice of openings and believe in them. They should be fun and interesting for you to play. **Do not waste much time trying to memorize all the lines though; your time is better spent learning more about the game of chess.** Besides, it is unreasonable to expect to understand, let alone to memorize, all of the lines that a GM knows.

Playing Strength: Beginners should probably start with gambits and aggressive openings in order to learn about tactics and positional play. Stronger players can still play open games, but they should play more solid

“open game” openings. The average player should usually seek an opening that is simple and easy to learn; it should also have few variations and plainly defined ideas and goals. You should understand each move for its small part in the grand overall strategy of the opening.

Easy: Learning openings like the King’s Indian Attack or the Colle have pros and cons for beginners. On the one hand, they are easy to learn, so your time is freed up for learning concepts that are more important. On the other hand, they do not teach you much about chess. A better idea would be to try openings that are economical and simple, but will do the job of getting you into a playable middlegame. Try the kind of opening with which you do not go out on a limb seeking an early advantage. Many great masters have played these kinds of opening with the idea of getting into the middlegame where they would then outplay their opponents.

Main Lines: If you are an elite player or you have the time and inclination to play the main lines of the most popular openings, there is something to be said in favor of this approach. For one thing, you would be playing moves and concepts that have been produced by the greatest minds of the game (and these days with computer help). Another advantage to this approach is that the main lines of popular openings will usually go farther into the middlegame than will less analyzed lines. This can be a bonus when playing a higher-rated player because he will then be faced with the choice of playing to the point where the game is probably drawish and lifeless, or playing an inferior line (by deviating from the known theory in an attempt to try to win).

Sharp: If you have a fondness for attack, you should pick openings in which you get the initiative (even at the price of material loss or positional weaknesses). Remember, the more popular and sharper an opening is, the more important it is for you to know all the main variations (because there are likely to be more traps and surprises associated with these openings). For instance, it would be risky to attempt to play the main lines of the Sicilian Najdorf, Sicilian

Dragon or the Marshall Attack of the Ruy Lopez without being well versed in their moves and strategies (not to mention trying to keep up with all the books, published games and recent technical articles). Because most non-professionals do not have enough time to devote to this end, it might be a good idea to avoid these openings in favor of less popular (and less analyzed) openings. These less popular openings will usually have fewer variations and will require less study.

GM Bent Larsen once said that if he had not played the Sicilian with black he could have saved himself 20 years of studying the more popular lines of the opening, which he said comprised probably more than 25% of all published theory. He said:

This ought to start some amateurs thinking, instead of complaining that they haven't enough time to study theory. Is it the sum total of their ambition in chess to be two moves ahead of Fischer in the analysis of the Poisoned Pawn line of the Najdorf? (Bent Larsen, *How to Open a Chess Game*)

Solid: If you do not want to put a lot of time into studying openings, or you have an interest in long-term strategies, you can opt for the more solid, less tactical, even slightly more passive openings. **Almost any opening is good if you understand it and know some of the lines.** If you have a reliable opening repertoire of solid openings and defenses, you do not have to worry much about strong surprises at the board. You can usually handle smaller surprises on the spot. When the opening is not too sharp you have a better chance of relying on your wits and playing on general principles. Think of all the time you will save. Be sure not to play so solidly as to hand the initiative over to your opponent though.

Fashion: Trendy lines require a lot of memorization and practice. In terms of return on your invested time, it is best to avoid them (again, unless you are among the elite). It is much more sensible for the average player to spend his

time on the kind of openings that you can get up and running within about six hours or less.

What is in fashion in the way of openings follows a predictable pattern: An opening is revised (a completely new opening is rare). Then, because it is new on the scene again, it catches many opponents off guard and scores some points. Eventually, the opponents start to solve its riddles and it dies away. In addition, there are stylistic trends that depend somewhat on who the top stars are, and who our heroes are, at the time.

Trying to follow the trends yourself with your opening choices and the latest variations requires a lot of time and effort (some of these lines go all the way into the endgame). Besides, except for the elite, playing trendy lines is likely to get you into territory that you do not understand. On the other hand, if you are an elite player, you should not only know the trends but you should have your own theory and your own lines. In addition, these lines should go, at least, into the middlegame.

Old: Sometimes, it can be effective for the average player to play currently popular openings, but not the novelties or lines that are the latest trends. In other words, play the current openings, but stick to the older theory. Being comfortable with the lines that you already know (and the resulting positions) can be worth the savings in time spent trying to keep up with all the latest variations.

In addition, **it can be good to use old or rare openings, or even openings that are not played at the highest levels.** Often, playing old openings (ones that are not currently popular at the higher levels) can be a successful strategy. **Many of the old openings are as good as the new ones; they are just currently out of fashion.** Be sure, though, that the reason the opening you choose is not played too much anymore is not that it contains a serious defect or a refutation has been found. If you specialize in these kinds of openings, there will not be as much theory to learn and you can become an

expert in lines with which most of your opponents will be completely unfamiliar. Playing unusual openings is another story; often times they are easier to refute over the board. Regardless of which opening you play, remember, **“how well a chess player plays the opening is much more important than which opening he plays”** (ron Curry, *Win at Chess*).

Variety: Many experts say that too little variety in your openings will lead to a definite dullness in your playing style. They say that you should not try to play with the fewest number of openings possible; that doing so will hinder your development as a chess player. There is another school of thought on this issue though. By limiting your repertoire to a few systems, you can get to know their intricacies a lot better. You can become familiar with the objectives and strategies of these openings.

In an interview, GM levon Aronian, when asked what chess understanding meant to him, said:

It is knowledge of typical positions and patterns. If you played a certain position many times, or analyzed it well, you feel confident in similar positions... One who plays a single opening their entire life, probably knows fewer typical positions than someone with a wider repertoire. (Levon Aronian, [Chessscafe.com](http://Chessscafe.com))

Playing several openings will certainly teach you a lot about pawn structures and positional ideas. It is believed that after you have learned all the pros and cons of any opening, learning another opening becomes easier. However, it takes time and effort to learn many openings well. In addition, unless you are a master (or higher), there is not much point, and it could be a waste of your precious time.

A sort of compromise might be to stick with an opening for a year or so and start to rotate some new ones into your repertoire. It is human nature to go for a little change now and then, even if it is not necessarily the wisest



approach.

**OPENING BOOKS:** When you are looking for opening books, **look for a book with many words.** you want to learn the ideas behind the openings, not just memorize variations. Most opening manuals and encyclopedias are collections of games (with frequent errors), short notes, and often-incorrect annotations and conclusions. Even the variations are not necessarily the strongest ones. Lasker once said, “Show me three variations in the leading handbook on the openings and I will show you two of those three that are defective.” A similar sentiment was evident when H.E. Bird said, in 1893, “Books on the openings in chess have continued to be fairly popular, but it is singular how very little novelty or originality has been imparted into them” (H.E. Bird, *Chess History and Reminiscences*). This outlook is still common today.

**CHOICE OF MOVES:** In the opening, there are too many pieces and possibilities to calculate all of the variations over the board. That is why, learning some basic openings is an expedient. Nevertheless, again, beware of copying moves from books or databases without understanding them. Do not play by rote without thinking about what you are doing. **Any move that does not fit the spirit of the opening is probably not a good one.** A common mistake is to think that you are in a familiar setting, and to routinely apply the consequent ideas to the position, but in reality the position is somewhat different and should be assessed it in another way.

A similar mistake often occurs when a player tries to transpose into a known line. Sometimes the line you are trying to transpose to is inferior to the one in which you currently are. Sometimes, the transposition will backfire. **If you are not sure of what the theoretical move is, or you do not understand the theoretical move, it is best to make your own decision and to trust your instinct.** At least you will learn something if you go wrong.

Some great players have even held that theoretical problems should be solved over the board (Hübner, Timman, et al). This may be a good way to force

oneself to focus, but it will likely cost you a lot of time on the clock.

**OPENING NOVELTIES:** A good “novelty” can throw your opponent off his game. It can be unnerving. It is also a good “time” strategy. Your opponent will probably consume a lot of time trying to figure it out. **A good way to find your own novelties is by starting with lines in opening books that end with “unclear.”**

I don’t know about you, but I delight when opening books use the ‘unclear’ symbol. It’s supposed to mean ‘unclear,’ but I believe that it really means either that no one has taken the time to evaluate the position or that someone is sitting on a powerful idea. (Jon Edwards, *The Chess Analyst*)

**NEW MOVES:** you can find strong new moves in almost any position, even if it has been around for centuries and has been studied meticulously. Of course, most of the moves that are in the books are there for a reason, they have proven themselves practical and reliable. If you are not content to be an artificial book player and you like to innovate, you might want to try to find a few of your own new moves. **There are many examples, in the history of mainstream theory, of moves that were discovered by amateurs.**

Again, this is a time-consuming prospect though. GM Roman Dzindzichashvili, on one of his very educational DVDs, makes this point in his typically insightful and engaging way (and one of my all-time favorite quotes as well):

What is theory today? Theory is when two players play and one of them makes a new move, and that’s it. That becomes theory until someone else makes a better move. So, you may be someone else! I was someone else many times because I spent hundreds of hours analyzing. (Roman Dzindzichashvili, *Roman’s Lab*, Vol. 2)

**OPENING PRINCIPLES:** The understanding of general principles helps

with the understanding of the opening variations. You must observe the principles behind opening theory. It is true that principles do not always seem to apply to book moves, but deep down, they must apply or the principle is wrong (which sometimes turns out to be the case). Most of the time though, if there is a conflict between principle and the book move, the move turns out to be wrong.

Chess theory is the current view of the state of the art of openings. It is based on the play of the best players in the world. Both the lines and the principles change over time, but the principles do not change as much as the lines do. “These ways are, of course, not eternal, and from time to time they are revised, but the principles!—The principles must be observed!” (Viktor Korchnoi, *My Best Games*, Vol. 1).

## UNUSUAL OPENINGS

Have you heard of these unusual openings?

- Barnes Defense
- Battambang Opening
- Borg Defense
- Corn Stalk Defense
- deprez Opening
- durkin’s Attack
- Fred Defense
- gedult’s Opening
- gunderam Defense
- Hillbilly Attack
- Ware Opening
- lemming Defense
- lowe Defense

- lundin-kevitz-Mikenas Defense
- Mieses Opening
- Napoleon's Opening
- Novosibirsk Opening
- Paris Opening
- Schlenker Gambit
- St George's Defense
- Valencia Opening
- Venezolana Opening
- Irish gambit Accepted (Aka Chicago gambit)

If you have, are you completely booked up on these (and all the many other unusual/ irregular openings)? If so, you have my condolences. Not to mention, you can skip this section!

When surprised by an unexpected move in the opening or an unusual opening, do not panic or get discouraged. These moves or openings are often inferior since, if they were not inferior, they would not be that unusual (they would be the main lines). Most of them are based on the idea of ignoring the principles (things like central control, rapid development and king safety). At first, take a little time looking for a refutation, but do not waste a lot of clock time trying to find one; that is what your opponent wants (that is probably even why he played the move or opening in the first place). Your opponent probably has analyzed the lines and might have a few traps in mind. Nevertheless, that does not mean that his analysis was correct, or that you will not find a way to avoid the traps, if any. Play soundly, and possibly, you can even steer the game back into strong lines with which you are familiar. However, beware of the temptation to try too hard to transpose into a familiar line. Often, this would be a mistake since the unusual line is probably inferior and you should have a better move than the normal line into which you would be trying to transpose.

**Irregular openings will not be successful against play based on sound opening principles. Play soundly,** and by principle. Play healthy, natural, principled moves. Be alert for traps. If you do not fall for any, you will probably get an advantage.

When your opponent plays a slightly strange variation, it can often be refuted by playing active, critical moves—in other words, by sharp aggressive play. If you play non-critical moves then your opponent will have a chance to get away with his strange play. (Simon Williams, *How to Crush Your Chess Opponents*).

You might decide to try unusual openings yourself from time to time. There can be some benefits, especially at the faster time controls. Playing an unusual, yet reasonably sound opening can have a psychological effect on your opponent.

As a rule, the less correct an opening variation appears to your opponent, the greater its psychological effect. Your opponent usually feels obligated to find a refutation, and so is drawn into long calculations, becomes nervous and often chooses a weak continuation. In that case, your opening experiment justifies itself. (Anatoly Lein, *The Latvian Gambit*)

## TRAPS

Your game should not be all about traps.

There is a distinct temptation to make trappy moves, that is, moves that are of questionable value but which set traps for the enemy. This is a bad habit to get into, no matter how often it succeeds. If you expect to improve in chess, you'll eventually reach the level of skill where trappy moves are recognized instantly for what they are. (Andrew Soltis, *Catalog*

*of Chess Mistakes)*

It is extremely valuable to be familiar with the basic opening traps, though. You should know all the potential traps in your basic opening repertoire.

Master players must necessarily consider a knowledge of opening traps—how to set them and how to avoid falling into them—a vital element of chess tactics. If knowledge of traps is important for the master, how much more so it is for the average player? (Irving Chernev, *Winning Chess Traps*)

**NAMES:** Some traps are so well known or old that they have names. Maybe the most famous is the Noah's Ark trap. This is the one where white's QB is trapped by the black queenside pawns. Other names include the Alapin trap, Canal trap, leonhardt trap, o'kelly trap, and the Tarrasch trap.

**SETTING:** A win is a win, even if it comes from a cheap trap. There is nothing wrong with setting a trap (as long as its avoidance does not weaken your game). The trap must be consistent with your game strategy because, if the opponent fails to fall for it, you do not want to be thrown off your game plan.

**Poor development is a key breeding ground for opening traps.** The tactically alert, better-developed player usually has the upper hand in setting traps.

What constitutes a good trap? We can distinguish two criteria: a) if, against all expectations, the opponent finds the best move, the damage to yourself should not be all that great; b) it should look a likely enough move for your opponent to make. In addition, it should have happened several times in practice and be based on the idea that the opponent will fall into the trap by making "normal moves" (Karsten Müller & Rainer Knaak, *222 Opening Traps after 1.e4*).

A trap can be set at any time during the game. Going for a trap as a desperate move in a losing position is worth trying. In fact, in a clearly won game the player with the superior game often feels unbeatable. Because they have dropped their guard a little, they might even be completely vulnerable for a little cheapo.

You need to distract the opponent a little in order to have him fall into the trap. Sometimes, a little acting can help. A look of defeat can help fool your opponent into overlooking the trap.

A strange or illogical move might tip off your intentions. Because of that, the first move of a trap should look natural or, even better, like a blunder.

Do not play a passive defense with the idea of trying to find a way to set a trap. **You cannot conjure up a trap out of thin air; it has to be there in the position.**

**AVOIDING:** Chess traps in the opening are usually based on opening errors. So, other than learning all of the opening traps (which would be a daunting task), the best way to avoid falling into an opening trap is to play the opening soundly. That is why strong players rarely are caught in opening traps. You should learn the traps in the openings that you play, though.

You should develop your pieces to constructive squares (where they are also safe) while following basic opening principles. Pay particular attention to pawn-grabbing or any other act of being overly greedy. Many traps are based on the greed of the trapped player.

## 2



# ***Middlegame***

*Before the endgame, the gods have placed the middle game.*

**—Tarrasch**

THE MIDDLEGAME IS the heart of chess. It has enormous possibilities. There is attack, defense, sacrifice, planning, and just about everything else. Tactics reign supreme in the middlegame. The middlegame is mainly a war between the pieces and center pawns of both sides. The wing pawns are often relatively insignificant. In fact, their absence can sometimes be beneficial in that lines of attack are created for the rooks.

**Middlegame theory does not follow unconditional and precise sets of laws. Instead, it involves extensive study of the rules of thumb, general principles, and maxims of common positions and situations.**

Middlegame theory does not change much over time. Unlike opening theory, middle-game theory stays relatively constant with small changes over the years.

**The middlegame is arguably the most important part of the game and it should consume the majority of a developing player's study time. A middlegame expert will usually beat an opening expert.**

Generally, you should not start middlegame actions unless the king's safety has been assured. When transitioning into the middlegame from the opening you need to analyze the position thoroughly. Then, make a plan. **“one**



**player may still be in ‘his’ opening while the other player is ready to proceed with middlegame operations”** (Dan Heisman, *Elements of Positional Evaluation*). In such a case, if you are the one who is in the middlegame, start your plan. If you are the one who is still in the opening, you need to make a plan too, but one which also includes finishing your opening.

When you get past the opening, do not forget to consider using the king. There are rare circumstances in the middlegame when the king can be of value as a piece. Of course, its safety must be assured first.

In the middlegame, you need to be creative, aggressive and you should thoroughly understand the position. Activate, coordinate, and prepare your pieces for action.

**Have the endgame in your mind during the middlegame.** Sometimes, you can steer the game into a favorable endgame. The endgame consequences of a move that you are considering might influence your choice.

## PAWNS

*The winning of a pawn among good players of even strength often means the winning of the game.*

**—Capablanca**

The subject of pawns encompasses the opening, the middlegame and the endgame. It is placed here only because it had to be placed somewhere!

## PAWN CENTERS

*Other things being equal, it’s always advantageous to occupy the center with pawns.*

**—David Bronstein, Zurich International Chess Tournament 1953**

The pawn center determines the character and the resulting plans for the ensuing battle. A strong and well-supported pawn center confers a positional advantage on its owner. **Control of the center usually means domination of the board.** A weak pawn center is a major disadvantage.

Generally, your chances of controlling the center increase with the number of pawns you have in the center. However, a large pawn center that is not adequately supported by pieces is vulnerable. If you have a full pawn center, you need to make it solid and impregnable. If you can do that, you will limit your opponent's central mobility and you will have a big advantage. Yet, a single inaccuracy could cause the whole structure to crumble.

A large pawn center controls key central squares and generally squeezes the opponent's forces. This limits their options for posts and the diagonals and files for getting there. The opponent's development is hindered and maneuvering is more difficult. The coordination between his pieces becomes strained. The large pawn center also has a great power of penetration and is not easy to restrain. Often, even when the advance fails, wing activity can be productive because of the central control. If the pawn center does not hamper the opponent's pieces, though, it is not an advantage (and may even become a liability).

The ability to advance a mobile pawn center is what makes it potentially powerful. A static or blocked pawn center, while it can still have a constricting effect on the opponent, generally limits the pawn center's power.

Once you have a dynamic pawn center, do not advance it too early. Center pawns are strongest when they are side by side. An over-extended pawn center can be a liability. Every pawn move creates weak squares (the squares it no longer protects). When the pawn center begins to advance, it gets farther away from its own camp and closer to the enemy's power. You have to take the advance of the pawn center seriously and calculate with accuracy because it often makes or breaks the game for the owner.

If you build a broad pawn center, you will probably be somewhat vulnerable since you will probably be behind in development. If so, you need to catch up quickly. If your opponent is the one with the large pawn center, you are obligated to attack it. Keep constant pressure on it. Your job is to turn it into a weakness.

**As pieces are exchanged, the pawn center becomes less important. The primary reason pawn centers are so valuable is to restrict the opponent's pieces.** However, as material is exchanged, the need to restrict them diminishes.

Especially in open games, white usually needs to occupy the center with pawns in order to get any real advantage. The Hypermoderns had a different perspective on what represented control of the center. To them, occupying the center with pawns (especially if not sufficiently backed up by pieces) was not the only way, or even the best way, to get control of the center.

There are about five major types of pawn centers (open, closed, fixed, mobile and dynamic), plus some variations of those and a few more hybrid types of central pawn structures. Most of them are briefly discussed below:

**CLASSICAL CENTER (PAWNS ON Q4 AND K4):** Since two pawns are considered strongest when they are side by side (on the same rank), the Classical Pawn Center is considered, by many, to be the ideal. Centers that contain the e4/d4 duo are generally strong. Many experts advise establishing the e4/d4 center whenever your opponent allows it.

The owner of the Classical Center should keep in mind the potential of advancing one of these two pawns at some point. Such an advance frequently establishes the theme of the ensuing struggle. The standard method is to locate your pieces in such a way as to support the central pawns as well as a possible advance. Maneuver to try to force your opponent to locate his pieces in a weaker position. Then, advance one or both of the pawns at the right time and, by way of a central breakthrough, generate threats on one or both flanks. To do

this, you have to maintain mobility, so try to avoid getting your center blockaded or in any way immobilized.

If you are defending against the Classical Center, you should post your pieces in such a way as to immobilize the opponent's central pawns and to force him into a passive position. You can try to weaken or remove one or both of the central pawns with a push of the c- or f-pawn. Another way to defend is to close the center. Try to entice one of the pawns forward and blockade the other.

**KING'S PAWN CENTER (BOTH KPS ON K4):** The king's Pawn Center has the same strategic qualities as the queen Pawn Center when both players castle queenside. However, the symmetrical king pawn center allows for more aggressive possibilities.

With both king pawns on their own K4s the typical support point is KB5. Additionally, P-KB4-5 often has a strong effect. KB5 is also an important outpost for the launching of a kingside attack. Also, in king pawn openings, control of the center often depends on the d4 and d5 squares.

**SYMMETRICAL FOUR PAWNS CENTER WITH KPS FORWARD (BOTH SIDES HAVE PAWNS AT K4 AND Q3):** Since there is no immediate likelihood of major pawn exchanges, both sides have the time to develop a plan. Usually, that plan will involve advancing either the QP or the KBP. When the QP is advanced, QPxP may lead to the KP center. On other occasions, it might lead to an advance of a d- or e-pawn to e5 or d5.

**SYMMETRICAL FOUR PAWNS CENTER WITH QPS FORWARD (BOTH SIDES HAVE PAWNS AT Q4 AND K3):** The typical advance is P-QB4, after which the focus of the game swings to the queenside. Being a symmetrical central pawn formation, this is not a good structure from which to attack. The reason is that, generally with symmetrical central pawn structures, there are usually one or more open files. Those open files will usually be occupied by rooks. Then, the rooks usually are exchanged. The exchanges lessen the

chances for an attack.

**FIXED CENTER (E.G., IQP VS. IQP):** With a Fixed Center, each side has one pawn. The pawns are blocked and cannot be easily changed. The Fixed Center has qualities of both open and closed centers and they are handled differently than either one. An isolated QP vs. an isolated QP is one example of the Fixed Center. With a Fixed Center, you should try to put pieces on the squares guarded by the central pawns (your strong points). Be careful about making pawn moves, because you might lose the ability to prevent your opponent from using his strong points. The play is usually with pieces and can be in the center or on the wings. If play is initiated on the wings, the attacking side will use the center as a fulcrum around which to swing his pieces for the wing attack.

**ADVANCED FIXED SINGLE-PAWN CENTER (KP FORWARD):** Typically, both sides maneuver around the central squares. Usually, centralization takes place followed by a flank action. The possessor of an Advanced Fixed Single-pawn Center (a sole advanced center pawn) usually has a middlegame advantage and often has ideal outposts for his pieces. If your opponent has castled kingside, you can often mount a direct attack on the king. The K5 pawn makes it difficult for the defender to use his KB3 square, which is often important for the defense of the king. In addition, the attacker has a strong point at his K4 to help with the attack.

Other typical attacking setups for the possessor of an e5 pawn include a rook on the f-file, or attacking h7 with a bishop at d3 and a queen at h5. Most of the time, when a Bxh7+ sacrifice works it is with a pawn on e5. For these reasons, with this central pawn structure, it is usually a good idea for the defender to castle queenside. In this case, the attacker will also control the defender's Q3 square, but that is not usually as crucial as the KB3 square is with kingside castling.

If your opponent has the advanced KP, your counter chances are usually to occupy your support points at Q4 and KB4. These points become more valuable

with each exchange. As a result, one strategy after securing these strong points, then, is to exchange pieces. Another countermeasure is often the opening of the KB file by playing f3. As always, these strategies depend on the whole position.

Endgames with the advanced e5 pawn, the pawn can be weak. For example, Alekhine Defense endgames generally favor black.

**ABSOLUTE CENTER (2 CENTER PAWNS VS. NO CENTER PAWNS):** It might seem that the possessor of the only two pawns in the center would have a clear advantage. However, there is a downside, too. The pawns are a target and the opponent can often direct pieces, including major pieces on the semi-open files, against these pawns. Winning one or both of them can swing the tide in favor of the side without the central pawns.

The player with the pawn center should aim to preserve them and use the outposts that they can provide. His goal is to advance these pawns at the right time. The advance can have a devastating effect on the opponent. The defender against the absolute center should try to blockade and attack the pawns.

**QUEEN'S PAWN CENTER (BOTH QPS ON Q4):** With the queen's Pawn Center the natural support point QB5 does not have as much impact as might be expected; although, there are times when it does. For example, with opposite-side castling, the side castling kingside could post a knight on QB5 and push his a- and b-pawns to start an attack. The side castling queenside would not have a similar way to mount an attack because there would not be any support points for him.

Normally, the structure usually does not allow for much aggression since the major pieces are often exchanged on the open files before any complications can begin. If you want to try for more than a drawish setup, P-QB4 is usually the only try worth thinking about for white. Black's best bet for a fight is to avoid symmetry.

If the players are both castled queenside, the game takes on similar

characteristics to the KP Center (with both players castled kingside). Then again, with the c-file open, queenside castling is often impossible or undesirable.

**HANGING CENTER (WHITE PAWNS QB2 AND KB2 AGAINST BLACK PAWNS AT Q4 AND K3):** The Hanging Center is normally a structure that black has (with white pawns c2 and f2 against black pawns at d5 and e6). It happens often in the French Defense, Advance variation, when white exchanges pawns on c5 and f6 after black attacks them with his pawns. The black pawns on d5 and e6 are “hanging.”

The battle usually centers on e5. Black wants to push his weak e6 pawn to e5. White wants to prevent black from making this push. Accordingly, if white can put a piece on e5 and keep it there, he will usually have an advantage because black’s e6 pawn will have a cramping effect on black and it will remain backward. Then, white will play to win one or both of the hanging pawns.

**LITTLE CENTER (PAWNS AT K4 VS. Q3 OR Q4 VS. K3):** The exchange ed or de has taken place and white has a pawn at e4 and black has a pawn at d6 (or d4 and e6). Because having a pawn on the fourth rank is stronger than having one on the third rank, white has an edge in the center and may have more mobility than black. The e4 pawn might also support a knight outpost. Black has to be careful about driving such a knight away (with his c-pawn or f-pawn) because doing so could leave both his d6 pawn weak and the c- or f-pawn weak (because it might be too advanced).

Usually, black’s strategy is to keep white occupied with the task of defending his advanced pawn. Black can also post a piece on the square in front of the advanced e- or d-pawn, tempting white to weaken his pawn center with the pawn push f4 (or c4). This will leave the central pawn without protection from its neighboring pawn. The most common way to deal with the Little Center for black is to try to challenge the white e4 pawn with the move d5 (or the d4 pawn with the move e5).

**LATENT CENTRAL MAJORITY (WITH QP IN RESERVE):** This is the central pawn structure with white pawns on e4 and d3 vs. a black pawn on e5. White's central pawn majority will stay latent until the black KP is exchanged. Therefore, white's idea is to force the exchange of the e5 pawn with either the move d4 or f4.

**TWO PAWNS ON THE FOURTH RANK (E4, D4) VS. ONE ON THE FOURTH DEFENDED BY ONE ON THE THIRD (E5, D6) CENTER:** The player with the two pawns on the fourth rank should try to keep the central tension (in other words, do not exchange pawns), unless there is a good reason. His opponent should try to release the tension (as long as the exchange eliminates the opponent's central majority). In other words, do not exchange if the player with the pawns on the fourth rank has the pawn protected by a pawn on the third rank.

**OPEN CENTER:** The open Center is when there are no pawns from either side on any of the central squares (d4, d5, e4, and e5). In this case, the mobility of the pieces is greatly enhanced. There usually is not much time for finesse. Tactics rule and attacks can come at any time. King safety, tempo and rapid development are crucial. A small advantage in piece placement or coordination (or bad piece placement or coordination) can be quickly decisive. Try not to move the pawns in front of your king. Wing attacks with pawns are not recommended and piece play becomes the rule. If a player tries a wing pawn attack with an open center, he will usually be wiped out by a central piece attack. The same is true with pawn-grabbing. Use your time more wisely. Castle, develop and attack.

The attacking side will try to provoke weaknesses in the opponent's position and will try to attack those weaknesses. The defender should try to repel the opponent's attack while trying not to create additional weaknesses.

**MOBILE CENTER (D4 + E4 VS. E6):** The Mobile Center occurs when two connected central pawns can advance against a single central pawn. The player



with the two central pawns has more control in the center. The possessor of the two mobile central pawns wants to advance them, but he needs to be sure that such an advance is safe. One of the objects of the advance is to create a passed pawn.

The opponent also wants the advance of the central pawns, but he wants to provoke the central pawns into a premature advance that weakens them. He should also try to control the squares in front of the pawn duo.

**CENTER UNDER TENSION (FLUID CENTER):** The Center under Tension can sometimes transition to a closed center, an open center, a fixed center, or even a mobile center. The transition depends mostly on whether the tension is maintained or released. Both players are waiting for the right time to change the center into the type of center that favors or suits them. Meanwhile, it is risky to make pawn moves in front of your castled king when there is a fluid center.

**DYNAMIC CENTER:** A Dynamic Center is an unclear, “tense” position of central pawns. With a Dynamic Center, there are two center pawns on each side. The form is not yet set and will likely change. The idea is to guide the center into the type of center that suits your style or fits with whatever advantage you have.

**CLOSED CENTER/CLOSED FORMATIONS:** The main feature of this type of center is that the central pawns are wedged up against each other, closing the files and the diagonals through the center. Since the center is impassable and cannot be broken apart, both sides will maneuver around it and play on the flanks. A good clue as to which wing to press on comes from the direction your pawns are pointing. If you are white and have pawns on d4 and e5, they are pointing towards the black kingside. Generally, your attack will be more successful there (than on the queenside) because you will have more space there and an extra diagonal to work with. If you have a pawn on the fourth rank and you have a chance to get another pawn to an adjacent square on the

same rank, you should generally do it.

If the center is closed and white has pawns on e5 or d5, he should try to keep the pawn on the fifth rank because it cramps the black camp. This pawn wedge divides and limits the opponent's forces. If white cannot retain the pawn on the fifth rank, he should try to replace it with a minor piece. Black should try to get rid of white's advanced pawn or the pawn that supports it. If white, in turn, protects the pawn on the fourth rank with a pawn on the third rank, then black can usually open a file by capturing the fourth-rank pawn.

The pace is slower with the Closed Center than with the more open centers and the principles change a bit. For example, with a closed center, the king is often safe being left in the center. When the center is closed, and there is no immediate way to open it, an advance of the wing pawns is safe (even those in front of your castled king). Still, be careful—the loss of mobility of these wing pawns could amount to a positional weakness.

Both sides will target the base of the opponent's pawn chain. Any winning attempt will probably involve opening a file or two for the rooks. Since the pace is slower with closed centers and the short-term tactical chances are reduced, long-term strategy becomes the key.

Before doing so, cautiously consider the consequences of closing the center. Such a move can decide the direction of the rest of the game.

## ***PAWN PLAY***

**USE OF PAWNS:** One of the most important skills to possess in chess is to be able to execute effective pawn play. Pawns are used to control the board because they are less valuable than the pieces. Pieces help, but pawns are better suited for it. Unless there is adequate compensation, the loss of a single pawn can be decisive.

**IN FRONT OF PIECES:** One of the basic roles of pawns is to form a barrier behind which the pieces can safely maneuver. The more space there is behind

the barrier, the more freedom there is for the pieces to maneuver. **Avoid putting your pieces in front of your pawns.** By placing your pieces in front of the pawns, you block your pawns from forming this barrier. In particular, in queen's pawn openings it usually is not a good idea to block the c-pawn with a piece. The c-pawn is often used to attack the opponent's center by playing it to c4 or to defend its own center with c3.

**PLACEMENT:** It is usually a good strategy to put your pawns on the color opposite of your bishop. This gives the bishop more scope. If you cannot put your pawns on the color opposite of your bishop, then it might be good to exchange the bishop. **You should also try to put your pawns on the color of the opponent's bishop to limit its scope.** In the endgame, it is different. **In the endgame, you want to put your pawns on the squares opposite of your opponent's bishop in order to protect the pawns from being captured by the bishop.**

**FRONT OF KING:** Making a pawn move in front of your castled king is one of the most committal moves you can make. It is, generally, a risky move, especially if you and your opponent are castled on opposite sides. Generally, you should only make pawn moves in front of your king in order to gain material, or for attacking or defensive purposes.

**CENTER PAWNS:** You should usually try to retain a center pawn (preferably on the fourth rank). The center pawn helps protect your position from a central invasion. It also limits your opponent's piece and pawn activity. Two pawns abreast on the fourth rank are strong (for example, d4 and e4 or c4 and d4). They attack four important squares and, together, they are worth more than two pawns.

If you have center pawns, generally the plan is to advance them at the right time and to try to create one or two passed pawns. Even if you do not succeed in getting a passed pawn, the advance will force the enemy pieces away from the center; then, often, you can start a wing attack.

**WING PAWNS:** You should keep the a- and h-pawns on the second or third rank, for defensive purposes, until you castle. You should continue to wait to advance them further (if at all) until your development is completed. It is often good strategy to keep pawns on both wings. The theory and use of wing pawns has been developing in recent times.

Of late, flank play has taken on a life of its own, no longer subservient to or dependent upon central structure but in a mutual relationship on equal grounds or sometimes even one of controlling influence. This development is the most dramatic and fastest changing in modern pawn play. (John Watson, *Chess Strategy in Action*)

According to Watson, modern players are increasingly tending to ignore the traditional warnings about the weakening effect of flank pawn advances and are relying more on a concrete appraisal of the position.

**PAWN MOVES:** Pawns are generally at their peak strength in their initial position, but you have to move pawns in the opening in order to let the pieces out. It is also important to move pawns early in the opening in order to contest control of the center. When they are moved, pawns create structural weaknesses and form targets for your opponent to attack. This is one reason why you should not make pawn moves in the opening unless you are forced to, or have some good reason (such as to fianchetto a bishop). In addition, one rule of thumb is **if you have to create a weakness; create it as far away from the center as you can.**

Every pawn move leaves weak squares in its wake. Avoid making these holes especially if you cannot control them with your pieces. Every pawn move changes the character of the position. Since pawns cannot go backwards, the changes that pawn moves make are irreversible. Consider pawn moves carefully and do not make them unless there is a good reason.

You need to move some pawns in the opening in order to develop fully

and later for tactical and strategical reasons. The point is that you need to be aware of the weaknesses that each pawn move creates. Then, decide whether the advantages gained outweigh the weaknesses created. Do not make an unnecessary pawn move when you cannot think of anything else to do (something players tend to do, particularly in time-pressure).

**WHERE WEAKER: Don't make pawn moves where you are weaker.** Also, do not make pawn moves on the side of the board where your opponent has the initiative. When pawns are advanced, they get closer to the enemy, which makes them generally easier for your opponent to attack. So, be extra careful about pushing pawns in an area where you stand worse. An exception would be if you were advancing the pawns on the enemy king as part of your attack (as in an attack when castled on opposite sides). Also, "the rule—do not move your pawns on the side of the board where you are weaker" can be "turned on its head" with **"do not become weaker on the side of the board where you have advanced your pawns"** (Jacob Aagaard, *Chess*, March 2008).

**CAPTURES:** The best known of all the pawn-capturing maxims is probably: **"Capture towards the center when in doubt, or unless there is a good reason not to."** An example can be made using the rook pawn: The rook-pawn is, in a sense, a handicapped pawn since it cannot be defended from one side (and it cannot attack to that same side). Database studies show it to be worth about 15% less than the other pawns. By capturing towards the center, the rook-pawn is promoted to a knight-pawn.

The rule: "capture towards the center" applies mostly to the earlier phases of the game. Later in the game, as material is reduced, the importance of central control is lessened and the choice of which way to capture becomes based more on the demands of the position. **Later in the game (particularly in pawn endgames and knight endgames), often it becomes better to capture away from the center.** By capturing away from the center, an opposing king will have farther to go to catch the pawn. Another reason to

capture away from the center is that the outside passer is stronger than one closer to the center. Capturing away from the center also makes capturing the pawn more difficult for the opponent's knights.

A few other pawn-capturing rules of thumb are, **“only exchange pawns if you gain something,”** “the win of a single pawn can decide the game,” and **“when you have three pawns abreast and your opponent pushes a pawn in the middle of them, capture with one of the pawns and push the other.”**

**Advancing Pawns:** Generally, you should not advance your pawns beyond the fifth rank without making at least one capture along the way (two is even better). This helps to alleviate the loss of time it takes to get the pawn advanced that far.

Do not attack one of your opponent's mobile pawns with a pawn. It is not a fixed target and can move (by definition).

Try to force or coerce your opponent's pawns to advance on the side where you want to attack. You can use them as targets. The moves will also make them a little easier for you to attack, since they will be closer to your side.

## ***ISOLATED PAWNS***

Learning to play with and against the isolated pawn (Isolani, Singleton) can significantly improve your chess game. **The isolani is one of the most important middlegame structures in chess.**

**EVALUATION:** Deciding whether an isolated pawn is a positive or a negative feature is not always easy. Theorists disagree about whether it is generally intrinsically strong or weak. Its strengths or weaknesses cannot even be considered without considering other factors (such as the initiative and development). As a static feature, it is a weakness and the pawn will eventually be captured by the opponent. On the other hand, if the isolated pawn is passed

(especially if it is a center pawn and beyond the fourth rank), it can be good (even strong). **If a- and h-pawns are isolated, they are not serious problems** because the squares in front of them are not as important as the squares in front of pawns closer to the center.

**WEAKNESS OF:** An isolated pawn cannot be protected by another pawn (because its neighboring pawns are gone), so they must be defended by pieces. As a result, they are more expensive to protect (than if they could be protected by pawns). However, the most critical weakness of an isolated pawn is that the square in front of it cannot be attacked by a pawn. That gives the opponent a safe place to put a piece. Consequently, the defender's pieces must try to control the square in front of the IP.

The IP can be easily lost (especially in the endgame). Another problem with possessing an IP is that it might take so many pieces to defend it that another part of the board becomes weak. Even though the pawn might be defensible, it can easily lead to damage in other areas because of the ability of the attacker to shift the object of his attack quicker than the defender can react. The amount of mental effort involved in paying careful attention to its maintenance can be strenuous.

**PLAYING AGAINST:** When an isolated pawn is attacked, you will need to defend it with pieces (since there are no pawns around to defend it). Almost automatically under such circumstances, the attacking pieces will have aggressive posts while the defender's pieces are left in positions that are more passive. The attack on the pawn, when in combination with threats against the defender's tied up pieces, is what usually leads to the win of the pawn.

When playing against an isolated pawn, you should try to control the square in front of it. Try to prevent the pawn from advancing. Initially, a knight is often well posted on the blockading square. The piece located on the square in front of the IP also contributes to a space advantage. Then, exchange minor pieces (to reduce the defender's attacking potential). This also heightens the

inherent weakness of the pawn. Position the major pieces on the file of the pawn. Try to keep at least one rook and the queen so you can attack the pawn. The attacking side's queen is important because it can keep the king away from the defense of the pawn. With the knights gone, a rook is used as the blockading piece. The queen is then placed behind the rook (or rooks). The doubling of your forces can set up a pin of the pawn, and then one of your own pawns can attack the pinned pawn to win it.

**PLAYING WITH:** An isolated central pawn can be strong (isolated flank pawns rarely have any redeeming qualities; they are usually just a weakness). The isolated central pawn's strength lies partially in its potential to advance. **Its power improves as it advances and gains more space.** An isolated pawn on your second, third or fourth rank is a potential weakness because your opponent can plant a piece in front of it. If he does, it will give him a space advantage and will be confining for your pieces. Then again, if you can push the IP to the fifth rank or beyond, the space advantage will be yours. So, **if you have the isolani, advance it.**

With an IP, you will have play on the half open or open files adjacent to it. Use those files. **When you have the IP, piece activity is the main strategy.** If you can attack the king, do it.

Generally, you should **avoid unnecessary exchanges (especially of the minor pieces) without gaining something significant in return**, since exchanges tend to accentuate the IP's weakness. **It can often be especially useful to keep the bishop that covers the square in front of the IP.** your opponent will probably try to keep the queens on the board in order to win the IP in the thematic way (outlined above). That being the case, you can try to use your queen to keep him busy so he does not have time to win the pawn. Another approach is to try to **exchange queens so your king can come to the defense of the pawn.** Exchanging major pieces favors the player with the IP since, without the major pieces on the board; the king can be more



**safely added to the defense of the pawn.** The possessor of an IP has a good chance to survive an endgame with minor pieces, but almost no chance in a major piece endgame.

As an alternative to using the dynamic potential of the IP, in certain positions, advancing the pawn can lead to its being exchanged off and can result in the simplification of the game. If, at some point in the game the IP becomes a serious liability, exchanging it might be the best way out.

**ISOLATED AND DOUBLED:** When a pawn is both isolated and doubled, as you might expect, it is even weaker than it would be with one of the flaws alone. Pawns that are isolated and doubled have the problem of not getting support from a neighboring pawn and have the added setback of limiting the access of pieces that would otherwise be able to protect them. An isolated pawn can sometimes be a positive element, but isolated doubled pawns are not good about 90% of the time.

**ISOLATED AND BACKWARD:** When a pawn is isolated and backwards, it is weaker when it is on an open file and cannot advance. The greater the number of isolated and backward pawns a player has, the greater the weaknesses he has.

## ***ISOLATED QUEEN PAWNS***

**The isolated queen pawn (IQP) structure** can come from many openings and **is possibly the single most important structure in the game.** Knowing how to play with and against it is essential. In most ways, the methods of playing with or against the isolated queen pawn is identical to that of playing with other isolated (non-queen) pawns.

**It is crucial (for both players) to try to control the square in front of the IQP.** Control of this square is often the key to the whole game. “Control of the square immediately in front of the Isolani is enough to decide a game” (Andrew Soltis, *Pawn Structure Chess*).

**Giving black an IQP is usually worth a tempo in the opening for white.** It is usually too difficult for black to give white an IQP because, if he does, he falls too far behind in development. If black, then, is behind in development, the IQP may prove to be a dynamic strength for white.

**AGAINST IQP:** The square in front of the IQP is usually the most critical square in these kinds of structures. If your opponent has the IQP, the standard plan is to first keep the square in front of the pawn under observation with your pieces or **blockade it** (preferably with a knight). This is to keep it from advancing while you prepare to win it. Then, after gaining control over the square in front of the IQP, try to **exchange some pieces** to reduce the dynamic possibilities that are usually conferred upon the possessor. The more the reduction in material, the more the IQP becomes a static weakness. By the endgame, it can become a serious liability. Sometimes, you can convert it into the weakness of hanging pawns.

Try not to remove the blockade, as this might allow the IQP to advance. Build up pressure on the weak pawn. When the IQP is on an otherwise open file, **the major pieces should gang up on it**. The convergence of the power pieces should win it. The normal procedure against an IQP on d4 is to put a rook on d5 (after the minor pieces have been exchanged off). The major pieces are then lined up on the d-file, doubling or tripling on the pawn. At some point, the pawn will probably be pinned against an equal force on the other side, in which case a c5 or an e5 push can win the pinned pawn.

Occupying the square in front of the IQP is the older, traditional, way of proceeding against the IQP. It is a good method, but, it is a passive strategy and often it is difficult to make progress with it at some point. The more modern approach is to keep the advance of the pawn from becoming a good move while building an attack directly on the pawn (in other words, skipping the blockading step). **One other strategy against the opponent who has an IQP is to try to encourage an ill-advised or premature kingside attack.** The

player with the IQP frequently will attack recklessly because they feel the need to attack (or lose the pawn). With this strategy, you can often exchange pieces (which increases your chances of winning the IQP).

Knights are usually valuable pieces for the possessor of IQP structures. Therefore, **the player playing against the IQP should usually exchange all of the knights.**

Generally, you should avoid playing Bd6 when playing against the IQP on d4. The reason is that it makes it harder for you to establish a blockade at d5 and it reduces your pressure on the IQP along the file.

If you can create any other pawn structure weakness for your opponent (such as doubled pawns, a second isolated pawn, or hanging pawns), then his battle would be pretty much doomed to failure. However, in the absence of a second weakness, it is difficult to convert the weakness of the isolani alone into a win.

The basic plan against an IQP is to:

- blockade or control d5
- exchanges pieces
- focus major pieces on IQP
- contest open files to exchange rooks

**WITH IQP:** There are a lot of great players who relish the idea of playing with the isolated queen pawn because, in the middlegame with the IQP, you will more than likely have the initiative (since you would be the one most expected to have active play). If you have a big lead in development, an IQP can be an advantage.

There is a dynamic potential associated with possessing the IQP. In fact, **because of the better dynamics, modern strategy generally supports the side with the IQP.** “When you find yourself with an isolani, think of it as playing a gambit, but without the material commitment!” (Lev Alburt, *Building*

*Up Your Chess*).

The IQP controls some important central squares. It can almost guarantee a central space advantage and piece activity around the pawn. The open squares around the pawn give the pieces a little more opportunity for movement and free the pieces for development. An IQP on Q4 is a support point for K5 and QB5 and there are open and semi-open c- and e-files.

Your opponent will usually be a little tied up trying to restrain the pawn and defending against direct threats. He will try to exchange pieces and head towards the endgame. Accordingly, you **avoid exchanges** and keep him busy defending. “Those who live behind an isolani should not cast the first trade” (Lev Alburt & Al Lawrence, *Chess Rules of Thumb*).

The player with the IQP should **try to control the square in front of the pawn**. Try to prevent your opponent from blockading the pawn. Two reasons for controlling the square in front of the pawn are to deter the opponent from posting a piece there, and to help prepare for the advance of the pawn. If pushed, the pawn can lead an attack to break up the opponent’s position.

The IQP has good potential for supporting outposts for your pieces. When the player with the IQP gets an active game, he will usually have many tactical possibilities and it is difficult to neutralize his initiative. If you have an IQP and the initiative, you will often have the makings of a good attack. However, neither the kingside attack nor the threat to push the isolani is usually enough by itself. You need to develop both threats simultaneously to have the desired effect.

The advance of the pawn can open lines of attack. The pieces gain not only space, but also diagonals and targets resulting in a kingside attack. **It is important to keep the initiative, because if your opponent can get counterplay the pawn becomes a weakness.**

**Do not occupy the c- and e-files by rooks right away** because black can

contest the files with his own rooks. The resulting exchange would favor black in the middlegame because it would reduce white's dynamic possibilities of an attack.

You will usually want to **keep queens on the board for your attack**, but if the attack is neutralized or most of the minor pieces are exchanged, trading the queens can make it easier for you to help defend the pawn with your king (something that would be difficult with queens on the board). If you do need to start defending the pawn, trading the rooks can also reduce the chances of losing it.

There is the famous quote of Tarrasch's: **"he who fears an isolated queen's pawn should give up chess."** of course, what he meant by this was that IQPs are so common and important in chess that any serious player must learn how to play with and against them.

The basic plan when you have an IQP is to:

- attack
- avoid exchanges
- control q5
- put outposts on k5 or QB5
- play on the open QB file
- build pressure on the semi-open k-file

**IQP VS. IQP:** In the case of symmetrical IQPs blockading each other, the side with the bishop of the opposite color from his IQP has an advantage. This allows both the possibility of winning the opponent's IQP and freer movement of your own bishop. As well as, the disadvantage of occupying the c- and e-files with the rooks no longer applies.

## ***ADVANCED PAWNS***

A pawn that is capable of advancing is generally better than one that cannot advance. Likewise, it is advantageous to have a center in which you have the only advanced pawn. **An advanced pawn on the fifth or sixth rank, if properly protected, will drive a wedge through the enemy's position.** Such a wedge can disrupt the opponent's ability to transfer his pieces from one side of the board to the other. **If you have forced a knight to the back rank, you should consider a central pawn push, even if it sacrifices a pawn.** An advanced pawn also imparts a space advantage to its holder.

Generally, a pawn increases in value as it advances. **A pawn that is not at risk of being captured gains about 50% in value for every rank it gets to beyond the third rank. At that rate, a pawn on the sixth rank would be worth about the same as a bishop and one on the seventh would be worth about a rook.**

If the pawn becomes overextended (pushed too far without adequate protection), though, it can become weak. Advancing pawns farther than is necessary to allow for development and control of the center is a risky undertaking. **Space is not an advantage unless you can use it beneficially for maneuvering and for piece play.** If a pawn is beyond the fourth rank, advancing it is correct only about 20% of the time. **Any pawn advance beyond the fourth rank is usually correct only if it is necessary for the preservation of the central pawn structure and it is necessary to restrict the adversary's position.**

## ***PAWN MAJORITIES***

“Every healthy, uncompromised pawn majority must be able to yield a passed pawn.” These were the words of Aaron Nimzovich, in his classic *My System*. **The normal way to mobilize the passer is to begin by pushing the pawn that is unopposed by an enemy pawn on the same file (the potential passed pawn).**

A pawn majority alone does not guarantee that you can create a passed pawn. As Nimzovich said, it needs to be healthy and uncompromised. In addition, if it is created, you still have to nurse it to the queening square. In addition to the majority itself, the mobility of the pawn (after passing) is a crucial factor. If the pawn cannot advance, it is not nearly as strong as if it can advance. **Push your own majority as soon as possible and hold your opponent's majority back.**

A **healthy queenside pawn majority** generally confers a potential endgame advantage on its possessor because it can generate a passed pawn. In the usual case, when both players castle kingside, the player with a queenside majority (white) can use the passed pawn as a decoy to attract the opponent (black) over to stop it. Then, while black is over on the queen-side stopping the pawn, white marches his own king the other way (toward the kingside) to capture black's kingside pawns, thus producing a kingside passer that black cannot stop. The timing of the advance is important. **It is necessary to take care of all the details first before advancing the majority.** For example, if your king is on the side away from the majority, it is advantageous to exchange pieces because it will be easier to advance the majority with fewer pieces on the board.

**The fewer the pawns in the majority, the less time it takes to mobilize the majority to create a passed pawn.** With the larger majorities (for example, four to three or five to four) the defending king has a better chance of stopping the passer or bringing on a stalemate because the king will frequently be on a central file and will not have as far to go to actively participate.

**A three-to-two majority is easier to convert into a passed pawn than is a four-to-three majority.** In addition, if you have a three-to-two majority on the queenside while your opponent has a four-to-three majority on the kingside, you will have a technically simpler time of it than your opponent will

because you can use your king to aid in stopping the kingside pawns. A queenside majority is better than passed pawns in the center or kingside because its passer is not in as much danger of the enemy king blocking or attacking it. In the middle-game, you can advance the queenside pawns without endangering the king.

If you are the minority side and your opponent tries to advance his queenside majority, you should try for a kingside attack in order to delay the advance of his majority or try to get into an endgame before he can get a passed pawn. Then, in the endgame, you might have equal chances of advancing your majority as well.

**Generally, you should plan your action on the side of your pawn majority.** Not only does the advance of the pawns work toward creating a passed pawn, but also the space increase behind the pawns allows for more mobility of your pieces and less mobility for your opponent's pieces. Therefore, in the middlegame, you should try to activate your majority before he activates his, and use the pawns to open lines and force his pieces to passive positions. Then, in the endgame, use your majority to produce a passed pawn that threatens to promote.

**A typical plan when a player has an outside passed pawn is to combine the threat to advance the passer with threats against the king.** often, your opponent cannot meet both threats at the same time.

Often, a wing pawn majority is offset by a central pawn majority for the other player. **In the opening, the central majority is more important than the wing majority.** A central majority (with a queenside minority) can still be equal or even better than a queenside majority into the middlegame. **A central pawn majority favors the attacker.** However, if several pieces are exchanged off, the chances of attack diminish. Exchanges have a major impact when there are majorities in the pawn structure.

In view of the fact that most players castle kingside most of the time, a



queenside pawn majority is usually the best kind to have. Since the days of Steinitz and Tarrasch, theory has assumed that having a queenside majority was an automatic advantage. Modern strategy, though, says that the piece placement must be considered before assuming that any wing pawn majority alone is of value. Mobility is another important factor. You must be able to advance the majority. Generally, a mobile kingside pawn majority is more apt to be advantageous than an immobile queenside one.

Very often, a wing pawn majority is compensated for by a pawn majority in the center. In the opening phases of the game, this central preponderance is more significant and important than a wing majority, which in such early phases of the game just plays the minor role of a spectator. The central majority is chiefly characteristic of an attack on the opponent's king, and once pieces are exchanged its importance diminishes. With the approach of the endgame the wing that is furthest away from the enemy king, very often the queen's side, gains in value and it is often very difficult for the king to transfer himself to this zone of action and stop the march of the pawns, thus this pawn predominance plays a very important role in the later phases of the game. (Count Alberic o'kelly de galway, *Assess Your Chess Fast*)

## ***MINORITY ATTACK***

Until Capablanca, it was generally accepted that a queenside pawn majority would pretty much assure success. **Capablanca showed us that the minority could force either a backward pawn on a semi-open file or the creation of an isolated pawn. Either of which would then become a target.** By advancing his pawn minority, white tries to force a weakness in black's pawn majority. For this method to work, the pawn exchanges have to be forced, and there must be some pieces on the board. The minority attack can even gain

material for the minority side. **The minority attack is an exception to the rule that you should attack on the side of the board where you have a pawn majority. It is also an exception to the rule not to make pawn moves where you are weaker.**

If you have a healthy pawn majority on one side, your opponent will have a semi-open file at his disposal. Depending on the position, the player with the majority usually has the advantage if he can mobilize the pawns. Otherwise, if the opponent can immobilize the pawns in a defensive salient, the minority attack can be successful. **Exchanges increase the chances of mobilizing the majority wing.** The player with the majority should keep the unopposed pawn ahead or abreast of its neighboring pawn to avoid having it become backward. **If the unopposed pawn is able to get to the fourth rank the majority can usually remain mobile. If not, the wing can be stopped.**

In simple terms, if white has a- and b-pawns and black has pawns on the a, b and c files, the idea for white is to remove all but the c-pawn (which should then be weak). Here is how it works: As an example, with pawns on a2, b2, d4, (no c-pawn), e3 vs. pawns on a7, b7, c6, d5, f7 (no e-pawn). White's b-pawn is pushed to b5. If black takes with his c-pawn, he gets an isolated d-pawn; otherwise white takes, which leaves black with a backward c-pawn at c6.

Black, in this example, could try to play b5 first (to stop the minority attack), as long as he can defend his pawn at c6. This might also give him prospects of occupying c4 with a piece. He should also be able to occupy the a-file or neutralize it in case of an exchange of the a-pawns. Another try for black is to push his f-pawn to f4. In practice, this is usually more difficult to prepare. Another method of spoiling the minority attack is to play a4 (to stop b5). Still another try for black is to locate a knight on e4 which white is usually forced to exchange. Then, the white pawn (which is now blocked at e3) tends to cramp white which, when combined with a base at d5, can give black some tactical shots at white's kingside.

By the way, the same sort of idea, a minority attack against white 's e3 pawn starting with a push of the f-pawn to f4 (with g4 if necessary), is not usually a good idea because it would leave the black king too exposed to justify the possibility of creating one or two pawn weaknesses in white's kingside.

## ***PAWN DUOS***

The pawn duo (two white pawns or two black pawns positioned side by side) is the structure with which pawns attain their highest effectiveness in the most economical way. It is the strongest two-pawn structure for offensive purposes. **Moving a pawn up beside your most advanced pawn (forming the phalanx) is usually a good idea.** The duo attacks four squares on the next rank. Side-by-side the duo attacks both colors whereas as a chain it only attacks one color. It is a flexible structure. If one of the pawns is attacked by any enemy pawn, you can either capture the attacking pawn or advance your pawn (forming a chain).

Since the duo is strong, handle pawns in such a way that they form duos, or are able to form duos, and continue to be able to do this repeatedly. **The ability to form a duo is the most important quality of a pawn structure.**

## ***PAWN ISLANDS***

The more "pawn islands" (Capablanca's name for the clusters of connected pawns or little pawn chains) you have, the weaker your pawn structure is. The reason is that, for every pawn island that you have, there is at least one pawn that is not guarded by another pawn. Therefore, **the fewer pawn islands you have the stronger the structure is.** Fewer pawn islands give you more flexibility and more mutual pawn protection. **This has the most relevance in the endgame where the relative number of pawn islands is always important and sometimes even decides the game.**

If you have more pawn islands than your opponent does, you should look for dynamic compensation for your structural weakness. This means that you should try to keep as many pieces on the board as you can and to play actively. Your best chances are usually in the middlegame.

Whenever you can, you should try to create pawn islands in your opponent's structure. They give you weaknesses to attack and an endgame advantage.

There are an optimum number of pawn islands to have. **“for winning purposes, the best number of pawn islands to have is two.** To have only one pawn island seriously limits your winning chances; to have three makes it almost certain that you will have trouble protecting them all” (Cecil Purdy, *C.J.S. Purdy's Fine Art of Chess Annotation*).

## **BACKWARD PAWNS**

A backward pawn is widely recognized as a potentially serious pawn weakness and you should avoid creating one unless you get adequate dynamic or static compensation for it. The pawn itself is vulnerable, it has lost some of its mobility, and the square in front of it is a potential hole for the favorable placement of an enemy piece.

**A pawn is only backward if it is on a semi-open file and does not have a friendly pawn beside or behind it, and it cannot advance.** If the pawn can safely advance before it becomes fixed, or the opponent cannot open the file for a frontal attack, the structural defect can be tolerable. The backward pawn might not constitute a disadvantage if its possessor can control the square in front of it, shield it from frontal assault by a piece outpost placed vertically in front of it, or if he can protect it.

**The square in front of the backward pawn is the main factor.** When playing against a backward pawn you should try to control this key square. Control of the square in front of the backward pawn usually confers an

advantage. The square can provide for an enemy outpost. There are no pawns to defend the square in front of the backward pawn, only pieces can defend that square. Therefore, one plan for controlling this square is to exchange all of the pieces that can guard it.

The player with the backward pawn is saddled with a space disadvantage. The nearer the pawn is to its original square, usually the greater the space disadvantage is. The space advantage for the other side can lead to the exchange or win of the pawn and the subsequent entry into the position. Then, often the pawn that was protected by the backward pawn can become a victim, as well.

## ***PAWN SALIENT***

The pawn salient is a pawn formation that is an interlocking pawn chain. An example is white pawns at c5, d4, and e5, black pawns at c6, d5, and e6. In this example, white has two spearheads (c5 and e5) and a base at d4, whereas black has two bases and one spearhead (d5). **The side with two spearheads (white) should try to push the pawns adjacent to his spearheads** (the b-pawn and the f-pawn) to attack the bases of black's salient. **The side with two bases to his salient (black) should try to attack the spearheads of his opponent's salient with his adjacent pawns** (also the b-pawn and the f-pawn) because the base of white's salient cannot be attacked.

## ***PAWN STORMS***

A pawn storm (also called a pawn roller or pawn avalanche) is standard procedure when the players have castled on opposite wings, but even when both players have castled on the same side, it can also be an effective strategy if the center is closed. It is risky to advance your kingside pawns because your king can become vulnerable to an attack emanating from the center. However,

if the center is closed, a pawn storm can be effective.

If you have a great positional superiority, such as control of the center or a central space advantage and superior development, a pawn storm can be successful. It is important to be able to bring a larger force to bear on the opponent's king than he can bring together to defend. In fact, it is a violation of principle to move pawns on the side of the board where the opponent has an advantage in force.

The point of the pawn storm is to create weaknesses in the opponent's position and to open lines of attack for the pieces. An alternative reason might be to promote a pawn. **The dread of the pawn storm is the blockade,** because the idea of the storm is to open lines for the pieces, especially the queen and rooks. Sometimes, the minor pieces can also play a central part in the assault.

A direct attack on the enemy king and pawn promotions are not the only reasons to initiate a pawn storm. Sometimes, just the gain of space for maneuvering can be advantageous. One of the ideas of the pawn storm is to cramp the space of the opponent and to overwhelm his king protection. The plan is often easier to execute if a defender's pawn has already been moved in front of his king. Sacrifices are one of the keys to success here. If you can attack your opponent's pieces with the pawns as they advance, that is even better. You will gain tempos for your storm. **Two main methods are used: either a blockade is allowed and then a piece is sacrificed to break open the position, or a piece is sacrificed first, followed by the deluge of the pawns.**

In the case of same-side castling, the attacker using a pawn storm will leave little or no pawn protection for his own king and he may become overextended. Without adequate piece support, a pawn storm will fail because the squares behind the advancing pawns will be taken over by enemy pieces. **If the enemy pieces take over the squares in the wake of the attacking pawns, it should lead to a winning counterattack** because of the weak

squares. Therefore, it is important to enter into the attack secure in the knowledge that your attack will be overwhelming and the need to defend your own king is not likely.

Counterattacks can also come through the center or on the other wing. Preventing this counterplay is essential. **A counterattack may be more likely than expected because a pawn storm is slow.** The time involved in the pushing of the pawns can allow the opponent enough time to muster up a counterattack.

The preparation for a pawn storm usually begins in the opening, even before castling. This is because our own pieces can obstruct the advance of the pawns. Accordingly, you need to formulate the plan (of how to bypass the pieces in a time-effective manor) early.

When our own pieces hinder the freedom of movement of our pawns, this naturally suggests that we lose time by advancing them. Therefore we must set about preparing the pawn storm much earlier, even doing this before castling, making a way for the pawns to by-pass the pieces in their advance. (Paul Keres & Alexander Kotov, *The Art of the Middle Game*)

Even though early plans for the pawn storm are often conceived during the opening stages, pawn storms are rarely successful in the opening. The plan is best actually used in the middlegame or endgame.

## **STEAMROLLER**

Two or more mobile, central, connected pawns are referred to as a “steamroller.” The pawns are both able to advance. The threat to advance, or the execution, can be powerful. **The best defense is to entice one of them to advance and then to blockade the other one.**

## ***PAWN CHAINS***

The best pawn chains have their bases furthest back (as near to its original square as possible). The advantage increases as the pawn chain extends farther forward. The more forward the base, though, the more susceptible it is to attack and the weaker the chain then becomes.

It is important to maintain the head of the pawn chain, but, unless there is a reason to go after the head pawn directly, **the base of the chain is usually the target**. It is not always necessary to win the base pawn. Making it move or exchanging it will weaken the chain.

## ***DOUBLED PAWNS***

**There is no clear-cut rule as to whether a doubled pawn is a weakness.** Horowitz considered it to be possibly “the least of all weaknesses” (I.A. Horowitz & Geoffrey Mott-Smith, *Point Count Chess*.)” Even when the doubled pawn is clearly weak, exploiting the weakness is difficult. The doubled pawn can be weak if you have to guard it with pieces or if the doubling creates a means of penetration for the enemy king in the endgame. It can be weak if the doubling cripples a pawn majority that could have produced a passed pawn. **The reason doubled pawns are weak is that they cannot defend each other and the front pawn cannot be defended from behind by a rook or a queen.** The weaknesses are the worst when the pawns are fixed. Doubled pawns in front of the king’s position that uncover the king are obviously bad.

**Modern players readily allow the doubling of pawns though**, not only because of the difficulty in taking advantage of them, but because they can be valuable for covering squares, and they can be useful in attacks. In addition, they can be good for defense.

Doubled central pawns are often good for the possessor because of the increased control of the central squares, the open or semi-open file and the



mutual support between the pawns. Doubled flank pawns can also be beneficial for the same reasons and, by capturing toward the center, the doubled pawn can exert a positive effect on the center.

Generally, **you should not mobilize pawn structures that have doubled pawns** because of the weaknesses left behind the pawns. One exception would be if the side mobilizing the doubled pawns has superiority in piece mobility.

The doubled pawns usually need to be defended by a single neighboring pawn. For example, pawns at a3, b2 and b4. With this kind of setup, the rear pawn is the only one that needs to be defended. For this reason, advancing the rear pawn is usually inadvisable. Otherwise, the whole formation needs to move, which tends to put the front pawn in territory that is more vulnerable. Advancing the rear pawn without advancing the front one means that two pawns need to be defended instead of one.

**An isolated doubled pawn is usually a major disadvantage.** Being on a semi-open file and subject to attack from a rook or queen makes it even worse. The two pawns in this case are only worth slightly more than one pawn. Doubled isolated pawns are weaker than isolated pawns because they cannot be defended or supported from the rear. As with any isolated pawn, the crucial square for both sides is the square in front of the pawn.

**It is a serious setback if the doubled pawn is part of a pawn majority.** This is because the doubling makes it much harder to create a passed pawn. The doubled pawn restricts the mobility of the pawns.

In terms of preventing a passed pawn, **the doubled pawn on a minority wing is not as big of a problem as the one on the majority side.** Outside of the fact that the minority attack would not be practical, there is not much of a reduction in defensive strength. It is also not a big problem to have a doubled pawn when there are equal pawn wings. In all circumstances, though, the doubled pawn is more vulnerable than one that is not doubled.

In most situations, **the exchange of major pieces heightens the**

**weakness of doubled pawns** (because of the loss of the advantage of having the semi-open file). Therefore, if you are the one with doubled pawns you should avoid any major piece exchanges. Usually, when **an a- or h-pawn captures toward the center, the resulting doubled pawn is a slightly favorable condition for the side with the doubled pawn.** However, if most of the major pieces have been exchanged, even this kind of doubling is detrimental.

**The reduction in value of a doubled pawn is estimated to be, on average, only about 1/8 of a pawn,** but this is because the benefit of the open file is factored in to the estimate. If the major pieces are gone (and along with them, the benefit of the open file) the reduction in value would be much higher.

**It is usually a good idea to advance the front pawn of a pair of doubled pawns.** It is usually bad to have the front pawn unsupported because the front pawn tends to be the weakest.

A king pawn that is doubled onto KB5 can occasionally be strong, but it is usually weaker than if the original king bishop pawn had advanced to KB5. This is because the original bishop pawn could be supported by a rook on the file and the capture that was made away from the center (by the doubled pawn) will likely weaken the center.

On the positive side, **in the middlegame, a pawn that is doubled by way of capturing towards the center may actually strengthen the center.** The central control may be compensation for its structural inflexibility. Sometimes, you can use the doubled pawns to smash open, expose or weaken your opponent's position. In addition, you will necessarily get an open file for your rooks. If you are castled on the same side as your opponent, the benefit of a semi-open file on the other side might be minor. The opening of a semi-open file near your king could even be a disadvantage. However, if you are castled on opposite sides, the semi-open file can be a big advantage, even compensating

for doubled, isolated pawns.

**Of all of the kinds of pawn weaknesses, the doubled pawn varies the most in terms of significance.** It is usually a problem in the endgame, but still it can be neutral there. It can range from good to bad in the middlegame. Therefore, **to have an all-encompassing general rule concerning doubled pawns is impossible.** As Max Euwe and Hans kramer said in their book, *The Middle Game*, “there is far too much diversity about the theme.”

## ***CRIPPLED MAJORITIES***

The main problem with doubled pawns is their lack of flexibility. If the doubled pawns are part of a pawn majority, it is generally impossible to create a passed pawn without the opponent allowing you to undouble them. Therefore, the value of the crippled majority is less than one pawn (as in a healthy majority of one pawn). The value of the crippled majority is, according to another rule of thumb, less than the bishop pair (which is worth almost a half a pawn). The value is more than zero though, because the doubled pawns do have more value than one pawn, if for no other reason than the count of attacked squares. As a result, **some sources consider the loss due to the crippled majority to be worth about 3/8 of a pawn.** Statistics confirm that the crippled majority is an important factor.

## ***PASSED PAWNS***

A passed pawn is one that can advance to the promotion square without opposition (blocking or capturing) from any of the opponent's pawns along the way. The unstoppable threat to promote a pawn is the theme of most decisive games. Queening a pawn is one of the strongest moves in the game. **An advanced passed pawn is either extremely strong or extremely weak and that strength or weakness increases as it advances.** The main question,

then, when thinking about advancing, is whether the advance will strengthen or weaken the pawn.

The maxim is, **“Passed pawns must be pushed.”** Push a passed pawn when it is likely to reach the goal of queening or will be protecting important squares. It is wrong to push a pawn that can be captured, successfully blockaded or will only protect unimportant squares.

In the middlegame, you can usually stop the advance, but the threat of its advance can tie up the enemy pieces and can act as a decoy for actions elsewhere. **The proper advance usually requires support.** Once the passer is produced, you should mobilize your forces around it to assure its longevity. Concentrate all your efforts on sustaining the passed pawn. The best support usually comes from the rook, since it operates on the file and the pawn advances along a file. Another maxim is, **“Rooks belong behind passed pawns.”** In the endgame, the king is the typical provider of support. The king can dislodge a blockader if it is a rook, bishop or knight. If successful, the piece must retreat, which allows for a further advance of the pawn.

**The strength of a passed pawn increases as the number of pieces on the board decreases.** Each time a piece is exchanged there is potentially one less piece to stop the pawn. Major pieces are poor blockaders. Therefore, if you have a passed pawn, it is normally a good idea to exchange as many minor pieces as you can. Even a few exchanges can seriously help your chances of a promotion.

Knowing that the exchanging of pieces can help the player with a passed pawn can be useful knowledge. For example, a player under attack is usually advised to exchange pieces. If that same player is also facing an advancing passed pawn, he has a dilemma. This means, if you are attacking and you can create a passed pawn, it would force your opponent to go against one of the principles. Furthermore, a passed pawn near the opponent's king can lead to decisive tactics.

If you are initiating the advance of a pawn majority, then **you usually move the potential passed pawn first**. You should **avoid moving pawns on the same side as your opponent's pawn majority** because that only accelerates pawn exchanges which simplifies the process of promoting the pawn.

If your opponent has a protected passed pawn, blockade it, avoid exchanges, try to keep the game complicated, and try for counterplay. You should only let your opponent get a passed pawn if you know you can effectively blockade it.

The square in front of the passed pawn is the most important square. The advantage goes to the player who controls it. If a passed pawn is blockaded, the player with the pawn must break the blockade. Many times, he can accomplish this by means of a sacrifice, since the passer is headed for promotion anyway.

No section on passed pawns can end without including the famous quote of Aaron Nimzovich, from his classic book, *My System*: "The passed pawn is a criminal, who should be kept under lock and key. Mild measures, such as police surveillance, are not sufficient."

## ***OUTSIDE PASSED PAWNS***

Having the outside passed pawn is a stronger endgame advantage than having a central passed pawn because the king can usually stop the center pawn easier. To go after the outside passed pawn, not only the king, but all of the forces involved in the hunt need to decentralize. Decentralizing would then give the opponent a chance to strike somewhere else while these pieces are out of play.

If you do not have an outside passed pawn, you should try hard to create one. An outside passed pawn (or even a distant passed pawn) is such an advantage that the player that creates one first, usually wins the game. They are nearly automatically decisive.

## ***CONNECTED PASSED PAWNS***

If two passed pawns are on adjacent files, they are connected passed pawns. It is difficult to stop them from advancing because every time a piece is used to blockade one of the pawns the other pawn can attack the blockading piece.

**If you have connected passed pawns, you should try to move them together.** Try not to let one get more than one square ahead of the other, keeping them abreast whenever possible.

**Two mobile passed center pawns or two far-advanced connected passed pawns can be worth a piece.** It will often cost the defender a piece to stop them.

## ***PAWN STRUCTURE***

The basic character of the whole game is determined mostly by the pawn formation. Pawn structure is the skeleton of chess positions. The understanding of pawn structures has increased over the past 65 years more than almost any other aspect of the game. As time goes by, theorists are discovering more and more positions in which pawn structure is more important than even development, especially when development is restricted by rules like “move a piece only once in the opening.”

Pawn structure is usually the most vulnerable during the early part of the game. It can take time to develop a strong pawn structure, but once accomplished it can effectively obstruct the opponent's mobility. On the other hand, if the pawn structure itself loses its mobility, it can become a target.

In spite of the fact that there are hundreds of openings, **there are only about a dozen basic underlying opening pawn structures**, and it pays to become familiar with as many as you can. They can all emerge out of many openings. **The handling of pawn structures separates the strong players**

**from the weak players.**

A particular pawn structure is not always good or bad. It depends on many factors. It depends on the position as a whole. There are advantages and disadvantages in any structure.

The pawn structure is like a skeleton for the pieces to work around as efficiently as they can. When the pawn structure changes radically in a game, you should spend some time getting familiar with the new structure before charging ahead.

It is valuable to have the basic pawn patterns memorized (from the opening, middle-game and endgame) and to know the theory on how to play them. The power of the pieces, control of the center, king safety, space, and mobility are all based on the pawn structure.

**ASSESSMENT:** One of the first tasks when assessing a position is to consider the pawn structure. Try to make good use of your structure and try to prevent your opponent from making the best use of his. The assessment of a position is largely based on the pawn structure. Weak squares and weak pawns (such as doubled, isolated, or backward pawns) are the result of defects in the pawn structure and are independent of piece placement. Yet you must consider the piece placement (as well as the type and number of pieces) when judging the quality of the pawn structure.

**PIECE PLAY:** The pawn structure has a great deal to do with how you will post your pieces in an effective and well-coordinated way. You should keep this in mind when you are building your structure. For example, do not put pawns where they might block or reduce the scope of your pieces. At the same time, try to hinder your opponent from building a structure that will allow his pieces options, coordination and activity.

The structure can give us a clue as to what to do with our pieces. Before planning our piece maneuvers, we should scrutinize the pawn structure. Often, players get so concerned about their pawn structure that they lose sight of the

fact that piece play is still more important than pawn structure.

**The pawn structure is static; winning is dynamic. Do not avoid playing a strong move just because it might cause some minor damage to your pawn structure.** “Pieces must come before pawns. The pawn structure only matters in so far as it affects the power or scope of the pieces” (John Nunn & Peter Griffiths, *Secrets of Grandmaster Play*).

**STRATEGIC:** Because the pawn structure is so static, it is a key factor in strategy and tactics (maybe second only to king safety). The decision to change the pawn structure requires great care. It can change the character, direction and outcome of the game. The pawn structure of any position determines available squares and lines for the pieces. **A good pawn structure with good piece activity is the basis for good positional play.** Consider the pros and cons of the structure when making a plan. “The pawn structure of a position dictates what the correct plan should be” (Danny Kopec, *Opening Pawn Structures, Advanced Concepts, Vol. 1, DVD*).

The nature of the pawn structure largely dictates the kind of strategy we should use. It is particularly relevant for the longer-term and the endgame. That does not mean that pawn structure is not a big strategic factor in the opening and middlegame. **Probably more than 80% of the strategy in the middlegame is based on the pawn structure.**

**SYMMETRICAL:** Symmetrical pawn structures usually lead to drawish positions. It is when the structure is uneven that a real fight can happen. If the pawn structure is symmetrical and there is only one open file, development becomes the key issue. There are not a lot of prospects for strategic planning. A single tempo can be decisive. The first player to become aggressive may be able to force the other into a permanently passive position. Therefore, even at the cost of material, it could pay to break out of the symmetry.

**DEFENSIVE:** Defensively, as well as offensively, pawns are strongest



**when they are on the same rank as their neighbor**, because if one of the pawns has to move, it will then be protected by the neighboring pawn.

**CHANGE:** If you want to change your opponent's pawn structure, there are several ways to do it: You can make a threat that your opponent can only meet by advancing a pawn. You can exchange a piece that he can only recapture with a pawn. As well as, you can remove pawns from the structure by a pawn exchange or a sacrifice.

**HOLES:** Generally, you should try not to allow holes in your pawn structure, especially in front of your castled king. The holes make it easier for your opponent to occupy squares in your territory with his pieces. On the other hand, if your opponent is the one with holes, you should try to occupy them with your pieces. If he does not have holes in his structure, you should try to provoke some.

**STATIC:** Because pawns move so slowly, pawn structures tend to stay fixed or unmoved for long periods, even for the whole game. Pieces, of course, can be moved to a better post. Therefore, a flaw in the pawn structure is usually much more long lasting than one in piece placement. **The pawn structure is the most permanent feature in the game.** “As such, it influences—and sometimes dictates—strategy and tactics .... Sound pawn formations combined with active pieces are the cornerstone of effective positional play and tactics” (Ron Curry, *Win at Chess*).

**ENDGAME:** Pawn structure becomes more significant as the endgame approaches. Structures that have a positive value in openings and middlegames might not be strong for the endgame; they might even be weak. As an example, if a few weak pawns are created during a winning attack, it does not make much difference. The rules change for endgame pawn structures as compared with middlegame pawn structures. For example, a Maróczy Bind can be restraining in the middlegame with most of the pieces still on the board. However, if the bishops are gone, it is a different story. Therefore, it is

important to reevaluate the pawn structure as the endgame approaches and make any necessary adjustments.

## ***RAMS***

Rams are locked opposing pawns. **The attacker should try to avoid rams** because they separate the rival forces and cause immobility. Rams favor the defender.

## ***HANGING PAWNS***

**WEAKNESS:** Hanging pawns (an isolated phalanx or a pair of isolated pawns) are usually weak because **they are subject to attack along the files** and, when one of them is forced to advance, the rear pawn becomes backward and weak. The advance of one of your hanging pawns creates holes that your opponent can potentially occupy. Both pawns are usually weak since they have to be guarded by pieces (they are separated from other pawns so they cannot be protected by them). In most cases, as long as these guarding pieces are not too poorly placed, defense is often feasible. If the defending pieces can be captured or diverted though, or if enough pressure is put on them, the pawns can be captured.

**As a rule, neither of the pawns can advance without causing a disadvantage.** They are also weak if, when either pawn is attacked by an enemy pawn, the attacked pawn cannot push or trade itself off without disadvantage. They are usually weak if the attacker has an edge in development. They tend to be weak if most of the minor pieces are gone (since their cramping effect on the opponent will be less useful). They can be weak if their owner does not have active play. **They are nearly always weak in the endgame.**

You can appreciate how weak hanging pawns are by realizing that if you

lose an isolated pawn, your weakness is gone; if you lose either one of the hanging pawns you still have an isolated pawn (so you still have a weakness). In fact, hanging pawns and isolated pawns can transform into each other and their disadvantages are similar.

Similar to isolated pawns, hanging pawns can become weak when the opponent is able to guard the squares in front of them with pawns and pieces. Guarding the squares in front of the hanging pawns with pawns and pieces keeps them from advancing. If they cannot advance, they can be attacked, especially from the front on the semi-open files. However, unlike the isolated pawn, hanging pawns present two targets for the enemy pieces.

**ADVANTAGE: Hanging pawns can be a potent attacking weapon.** With pieces behind them, they can advance with destructive power. Once the holder of the hanging pawns is well developed, he will be looking for a central push to initiate an attack. There is also the possibility of creating a passed pawn with either pawn. **If they can be maintained abreast or advanced on the owner's conditions, they can be strong.**

Side by side on the fourth rank, central hanging pawns control several key central squares. They can have all of the advantages of the broad pawn center. If the hanging pawns can stay where they are or threaten to advance aggressively, they can be strong.

They are similar to the isolated pawn in that they have dynamic potential. Hanging pawns are stronger than isolated pawns when abreast because they control four squares in front of them instead of two and they are capable of having one pawn defend the other. Unlike the isolated pawn, the hanging pawns, when abreast, control the two squares in front of them; so there is no hole for the opponent to occupy and no way for the opponent to blockade them. They also provide a larger choice of defensive strategies than are available with isolated pawns. For example, they can form two different pawn chains. These features give them better dynamic potential.

**AGAINST:** When your opponent has hanging pawns, the most important way to fight against them is to make a strong effort to attack the pawns directly. When it is safe, attack them head-on so that one of them has to move, and then you can blockade them. The idea is, with piece pressure, **to try to force or entice one of the pawns to advance which will reduce their dynamic power and create a hole in which to lodge pieces** or give you one or two good squares for your pieces. **Blockading the rear pawn first will make it possible to control the other square, too. Alternatively, try to eliminate one of the pawns** (which will leave your opponent with an isolated pawn). Exchange pieces whenever possible.

Try to control the unoccupied central squares. **Fianchettoing the bishop can help** because from the fianchetto the bishop can put pressure on the pawns and, at the same time, puts the bishop out of the way of the major pieces. The major pieces can be useful on the files to attack the pawns. Try to provoke the advance of the pawns and **watch for a chance to break through with a neighboring pawn on either side of the hanging pawns.**

**Try to exchange the minor pieces** so you can exert more force on the hanging pawns with the major pieces. This can be tricky though, because if the opponent gets a passed pawn, it will be to his advantage to have the major pieces on the board.

**WITH:** Hanging pawns are best placed abreast of each other, as long as they are adequately guarded. If you have hanging pawns, you should use their dynamic plusses and play dynamically. They can be a strong weapon. Use them as the lead of your attack and be looking for the right time to advance one of them to gain space and piece control. Use the open files.

If you play passively, you will probably end up with the hanging pawns becoming a weakness. **As with isolated pawns, it is useful to have as many minor pieces on the board as possible.**

The endgame with hanging pawns is not necessarily lost. A player, who is

seriously ready for action, can usually allow the intrinsic danger of hanging pawns.

Max Euwe provided the technique to use when in possession of the hanging pawns on Q4 & QB4. He said to keep the pieces on the board, try to control K4, K5 and KB4 (all vacant squares). The adjacent K4 square is extra important. At the right moment the advance P-Q5 can be decisive, since it opens the QB's diagonal (the bishop is usually at QKt2). The advance P-QB5 is also important. The weakness of q4 is then offset by the strength of Q6 (which is attacked by the pawn at QB5), and possibly by a weakness at the opponent's qkt2. If he plays P-QKt3, then P-QR4-5 should give you an initiative without risk. The advance P-KB4-5 weakens the center. Play it only if it decisively strengthens your attack.

## ***PAWN TENSION***

**The question of whether retaining or releasing the tension in the center favors one side or the other always depends on the overall character of the position.** It is a complex tactical and strategical question and, as with any pawn structure change, requires careful consideration. **“Clarifying the central tension—effectively deciding the course of the game—is a critical moment, and so requires careful analysis”** (Zenon Franco, *Chess Self-Improvement*).

When pawns are side-by-side and they can be pushed, or pawn exchanges become possible, there is tension on the board. This tension does not simply disappear. However, do not rush to trade the pawns as soon as they encounter each other. The object of keeping the tension is so you can release it at just the right time with explosive force. **Releasing the tension reduces your options, which might eliminate some of your counterplay.**

**The release of central tension usually favors the side that is cramped.** Maintaining the central tension for a long time is not usually good for the

defending side. Accordingly, **if you are defending or cramped, you should try to exchange the pawns (trying to liquidate the center entirely), or try to force your opponent to release the tension himself by putting pressure on his center pawns.**

Since the release of the tension eases your opponent's game, and can even cause a rebound effect, you should not initiate the exchange unless it is necessary or you have a specific reason (such as to isolate the opponent's pawn or to extend a pawn chain into his position). If you have a space advantage and a solid position, you might be able to withstand the results of relieving the tension. Still, generally, you should wait as long as possible to release the tension.

Generally, you should even try to increase the tension with the idea of provoking the defender to give up some space by releasing the tension himself. This is usually possible, since the player with less space tends to run out of useful moves first. If you can coerce your opponent into releasing the tension, it is a minor victory for you. **“never, ever relieve the central tension unless you have no choice or gain something valuable in return”** (Edmar Mednis, *How to Play Good Opening Moves*).

## ***PAWN BREAKS/LEVERS***

Pawn breaks are important in the endgame and the middlegame. In games with closed centers, the pawn breaks on the wings make it possible for the rooks and queen to get into the game. The pawn breaks can create passed pawns and open lines for attack. The pawn lever (as Hans Kmoch called them in his book, *Pawn Power in Chess*) confers more power to the pieces and heightens the battle. **“Pawn breaks are not only important in pawn endings. Creating passed pawns and opening lines are also effective weapons in the middlegame. Quite often the pawn lever increases the field of action and strengthens the pieces enormously”** (Claus Dieter Meyer & Dr. Karsten Müller, *The Magic of*

*Chess Tactics*).

Pawn breaks are what opens lines and determines which side controls the open lines. **The player with the most levers, or potential pawn breaks, has the advantage of deciding when and where the open lines will be.**

**Try to get your pieces on their best squares before making a pawn break.** As with any pawn move, it is irreversible. **Try not to block your break pawns (c & f-pawns) with pieces, the pieces are usually placed better behind those pawns.** In addition, the rooks are often well placed behind them.

Try to weaken your opponent's center with pawn breaks. **If your opponent has pawns in the center, attack them with wing pawns. Do not rule out attacking with your f-pawn, even at the risk of exposing your king. It often makes for a good pawn break.** If your opponent plays a break move with a central pawn (d- or e-pawn), it is often good to take it with your pawn.

You should always analyze all possible pawn breaks in the center to see if they are playable. They can often be a very powerful weapon.

## ***PAWN CAPTURES***

The basic rule, for capturing a piece with a pawn, when you have a choice, is to **capture toward the center.** This is to increase your central pawn presence. There are some exceptions. **The main exception is when capturing away from the center favorably opens a line for piece play.** If, in a particular case, you get quick development or enough enhanced piece play to outweigh the loss of the central pawn pressure you might be justified in capturing away from the center. Another, though more rare, exception would be when after capturing, the capturing pawn still guards a central square from the subcenter.

**If you have two pawn islands and the choice of moving a pawn from one island to the other (or an isolated pawn joining one of the islands), as**

**a rule of thumb, you should move the pawn to the larger island.**

According to Nimzovich (*My System*), **you should always capture a central pawn if it is not too dangerous.** Pachman is a little more cautious, saying that “a center pawn should be taken only when tactical calculation shows that the opponent’s immediate threats can be successfully warded off and no insurmountable difficulties in the development of the pieces are to be expected” (Luděk Pachman, *Modern Chess Tactics*).

Capturing a central pawn not only gains material, but also reduces your opponent’s presence in the center while increasing yours. A central pawn is so valuable that you can capture it, in many cases, even when the opponent gets substantial compensation.

It is usually more risky to take a rook pawn or a knight pawn than a center pawn. That is because the loss of time is sometimes more valuable than the pawn, and the removal of the pawn can open lines for the opponent.

When you initiate a trade of pawns, you are essentially trading your pawn for your opponent’s recapturing pawn. For example, if you capture d4xe5 and your opponent recaptures d6xe5, you have just traded your d4 pawn for his d6 pawn.

## ***PAWN-GRABBING***

Pawn-grabbing (a.k.a. pawn snatching, pawn hunting) is generally a bad idea if you are behind in development. **Winning a pawn in the opening is almost never worth the concessions that you have to make.** Steinitz used to advise against grabbing pawns until being fully developed (unless you are capturing a center pawn).

**Avoid snatching a pawn that opens lines leading to your king.** Do not grab wing pawns (especially with the queen) when you should be developing pieces. If winning the pawn does not take you closer toward a winning position, then you should not take it.



A pawn hunt into enemy territory by the queen will usually lose two or three tempos because the queen will usually be attacked by developing enemy pieces. Those two or three tempos can be worth more than the pawn itself, not to mention the possibility of getting the queen trapped. There is a saying **“Never take a knight’s pawn with the queen.”** you should not take the saying too literally, of course, but you should definitely be cautious when doing so.

There are not any clear-cut rules to guide you when you are not sure whether to go pawn-grabbing, There is Capablanca’s rule (**do not win a pawn if it costs you more than two tempi**), but that is most specifically related to gambits. You should try to make an accurate evaluation of the position and calculate as precisely as you can. Then, if you are well developed, you can usually spare a few moves to take an important pawn. You should take the pawn if you will get an inferior game by not taking it. You should take the pawn if you can withstand any resulting threats or initiative from your opponent if you take it. You should take the pawn as long as you do not lose most of what other advantages you might have accumulated. The general advice is that, **if you are in doubt, take the pawn.**

**In spite of the admonitions, in contemporary chess, players are getting better and better at grabbing a pawn early on and then defending all the pressure and nursing it all the way to a decisive endgame. Strong players nowadays are quite apt to go pawn-grabbing unless there is a definite reason not to.**

# MATERIAL

*The material rule in chess: He who has the material, rules.*

—**Michael de la Maza**, *Rapid Chess Improvement*

## MATERIAL ADVANTAGE

If everything else is equal, material will decide the game. If you focus too much on material gain though, you might overlook a tactical or positional finesse. It is not a good idea to let the desire for material acquisition entirely replace your positional concerns, but you cannot be losing material or passing up the gain of material either. You have to balance both factors, but remember: “material rules.” **Fischer believed in taking the material that his opponent offered unless he could see a good reason not to take it.**

The maxim “**Material makes material**” is true. A material advantage makes it easier to gain more material. **Material is the most important aspect in chess and the closest to being the singly most decisive element.** In fact, usually, you must convert any advantage into material in order to win the game. **Material even trumps the initiative if you can neutralize your opponent’s advantages.**

**Once you have won material, you have to put it to use. If you have won the exchange, you should open files for the rook.** If you have won a piece outright, use it. It is an extra fighting piece. If you use it, you will have your opponent materially outnumbered. **There are two ways to proceed when you have a material advantage. One is to attack and the other is to simplify.**

**When ahead in material, think about defense first.** This does not mean that you should play passively. You should not play passively, or even

defensively. That is possibly the worst approach you could take. Rather, when you are thinking about your move, think about defense first, but then spend most of your time thinking offensively. Do not avoid complications unless they are too risky. Only by attacking, can you take advantage of a material advantage. So play aggressively, yet try to find the simplest, safest way to make your advantage work for you. Do not make unclear sacrifices.

With a material advantage, the rule is to simplify. Exchanging queens is often a good idea. Make exchanges based on positional considerations. Avoid automatic exchanges though. Sometimes, an ill-considered exchange can nullify your extra material. What's more, certain combinations of material can be drawish even though a favorable imbalance exists. Consequently, if you have the material advantage, you should avoid an exchange that would lead to drawing chances for your opponent.

**The simplification strategy applies only to pieces, not pawns. You want to win the pawns, not exchange them.** As you exchange pieces, the opponent's ability to defend the pawns decreases which makes it easier for you to win them. Another benefit to keeping more pawns on the board is that the drawing chances for the defending side are lower. If there are only a few pawns left on the board, be certain that they cannot be exchanged or captured. Try to keep some pawns on the board, preferably on both wings, to help ensure the win.

**After winning the material,** it is common for your pieces to be out of play. They were on an operation to win the material. The operation is over and a new one needs to start. This is the time to **regroup and re-focus your forces.**

## ***MATERIAL BALANCE***

One of Tartakower's famous observations was that **"It is not the material that has left the board that is important, but the material remaining on**

**the board!”** That is what you have to work with.

It is always important to know how you stand in relation to your opponent in terms of material. If several pieces have been exchanged, it is easier to keep track of the material imbalance than trying to remember all of the pieces that have been captured on both sides. When you are assessing the material balance, do not express it in terms of points. Your thoughts should be that you have a rook for a bishop, not that you are up two points. This improves your feel for the material balance, which, in turn, helps you plan better.

## ***PIECE VALUES/EQUIVALENTS***

**RULES OF THUMB:** There are many rules of thumb regarding the relative value of pieces. Here are some of them:

**The more redundant two pieces are, generally the weaker they are together.** For example, a queen plus a bishop is usually weaker than a queen plus a knight because the queen duplicates the bishop's moves.

**The value of a piece, particularly when the pawn structure hinders the activity or harmony of the pieces in general, is best assessed based on the piece's dynamic potential.** The value is in direct proportion to the piece's mobility and prospects.

The real value of a piece depends in part on what other pieces are still left on the board. The material values of pieces vary as the game develops. The value depends on assessments like what squares a piece can attack or defend and how important those squares are at the time.

**The value of a piece is largely dependent upon its potential mobility.** It is possibly the most important factor in estimating the value of a piece at any time. The value of pawns and pieces is based on what they can actually achieve.

There are many different approximations of the nominal equivalents of pieces, even statistically calculated values, but these kinds of estimates are only useful as a rough guide without regard to the concrete position (which is

the major factor).

Here is a collection of equivalents, all of which are approximated and rounded off. They are from many different sources. The equivalents are all based on the unit of one pawn (which, as well, varies in value, thereby making the guide even less reliable). The figures in brackets are those of Larry Kaufman (grandmaster and part of the brains behind Rybka) from his CJA (Chess Journalists of America) award-winning article, “*The Evaluation of Material Imbalances*.” The other values are from other sources listed in the bibliography. Not only do the experts differ in their estimations, but also comparing a value from one source to another value from a different source can be risky. In addition, the position on the chessboard is always the overriding factor:

#### TABLE OF EQUIVALENTS

½ Pawn	The advantage of the bishop pair (BB)
1 Pawn	1 pawn, rook on seventh rank, BB vs. bad bishop, 3 useful diagonals (for queen and bishops), 200 rating points
1½ Pawns	The exchange (on average)
3 Pawns	Knight [3 ¼ pawns], bishop [3 ¼ pawns], 2 mobile passed center pawns on the 5th rank
4 Pawns	Active bishop, centralized knight
5 Pawns	Rook [5 pawns], a knight on the 6th rank in the center, 2 connected pawns on the 6th rank
6 Pawns	bishop + knight (6.5 pawns)
7 Pawns	rook + 2 pawns
8 Pawns	rook + knight
9 Pawns	Queen [9.5 pawns]
10 Pawns	Queen + pawn, 3 minor pieces, 2 rooks

12 Pawns	Bishop pair + rook
13 Pawns	2 rooks + knight

Larry Kaufman is one of the world's leading experts in these kinds of matters. Like they say, "the proof is in the pudding"... and being a grandmaster, as well as being in charge of the evaluation function of Rybka, certainly ought to be pudding enough for anybody! Since I (the author) was using so much of his data, I sent Mr. Kaufman an email asking for his permission, as well as to ask if he had updated any of his previous calculations. He was kind enough to give his permission. He did make a few minor tweaks to his earlier data. He also gave me a little extra advice and he cautioned that listing values in isolation from some source that is not used for other values could lead to problems. He said:

Basically, you can avoid most of these problems by sticking to a consistent set of values for the pieces. Aside from my own, another that is used (approximately) by the program "Stockfish 1.4" (Stockfish being the strongest program which is "open source" meaning that its code is public) is N=B=3.5, bishop pair = 0.5, rook = 5.25, queen=10.5, though I think that the queen value is too high for humans. The simplest scale that is reasonably valid and sticks to half point intervals is N=B=3.5, bishop pair = 0.5, rook = 5.5, queen = 10.5. It doesn't matter so much which scale you use (within reason), but you need to be consistent. (Larry Kaufman)

**MINOR PIECE:** The specific details of the position are the key to determining the true value of a minor piece. For example, one pawn on the sixth rank can be worth a piece, but the final verdict depends on the actual position.

A piece is usually worth about three pawns. In the opening, if a piece is

exchanged for three pawns and the side that gained the piece is behind in development, the side with the pawns has the better likelihood of success. Sometimes, a piece can be worth even four or more pawns in the opening. If you win a piece in the opening, and most of the other pieces are still on the board (especially the queen), by having the extra piece you will most likely have a winning attack regardless of the number of pawns left on the board.

**The piece is usually slightly better in the opening and middlegame, the pawns are better in the endgame.** The side with the piece needs to use the piece actively to keep the initiative, especially if queens and other pieces are on the board. Each time the initiative is lost the opponent is given an opportunity to advance his pawns or to try to simplify. The side with the pawns should aim for an endgame.

Kaufman valued the piece at 3.14 on the average (as long as there are other pieces on the board and minimum mating material is not a factor), but only 2.5 for bishops in endings with no other pieces and even less for knights. This is, to some extent, because the player with the minor piece cannot win if his last pawn is gone. So, **the more pieces on the board, the more pawns a minor piece is worth.** This is especially true in the early opening or in the late endgame.

In a recent email from Mr. Kaufman, he added:

The value of the minor pieces slides from about 3.5 in the opening to 3.0 in the endgame, with  $3\frac{1}{4}$  a fair average. If one player has a major piece (rook or queen) and the other does not, the side with the major piece should be awarded a half point bonus. Also, I think that an unpaired bishop is on average worth about 0.1 pawn more than a knight, though it's inconvenient to include this in a material values table that is otherwise in quarter pawn units. Otherwise, I think you can still use my original values.  
(Larry Kaufman)

**KINGS:** The king's value is infinite, but its value as a fighting piece in the endgame has been estimated to be about equivalent to a knight (or maybe a little more). Others have placed it a little higher.

**KNIGHTS:** Knights, on the average, are worth a little more than three pawns, or roughly two-thirds of a rook (which is slightly less than two pawns less than a rook). **The power of the knight tends to diminish as the endgame approaches.** Two knights are usually better than a rook in the middlegame (especially in a closed position) and about equal to or slightly less than a rook and two pawns early in the game, but the rook and two pawns are stronger in the endgame. In the endgame, the two knights are worth less than a rook and one pawn. **The power of the knight decreases as the pieces are exchanged off** and the power of the rook and the pawns increases.

With a knight and two pawns vs. rook, the rook is only near equal (or about  $\frac{1}{4}$  of a pawn less than equal) when there are no more than two pawns vs. four; otherwise, the side with the knight is better. The side with the knight, in this case (when there are rook + two pawns vs. knight + four pawns), should avoid exchanges even though they are slightly ahead in material. As expected, the knight benefits from more pawns being on the board. A knight and seven pawns have about a  $\frac{1}{2}$ -pawn advantage over a rook and five pawns.

**A knight is worth a little less than a good bishop and a little more than a bad bishop** (especially if the knight is in a strong centralized position or blockading an isolated pawn). **A centralized knight is equal to an active bishop.** **A securely centralized knight plus a pawn is only slightly weaker than a rook.** **A knight on the fifth rank that is defended by a pawn, together (the knight and pawn) are worth nearly a rook.**

A knight and a bishop can be worth about a rook and two pawns in the middlegame. In the endgame, though, a knight and bishop are worth about a pawn less than that (mostly because of the depreciation of the knight's value). In the endgame the knight and bishop duo are worth more than a rook and one



pawn (not two pawns).

**BISHOPS:** Bishops, on the average, are worth a little more than three pawns, or roughly two-thirds of a rook (which is slightly less than two pawns less than a rook). An active bishop is equal to a centralized knight. A bad bishop is weaker than a knight (especially if the knight is centralized or performing a function such as blockading a pawn). A good bishop is stronger than a knight. **The power of the bishop tends to increase as the endgame approaches.**

**BISHOP PAIR:** Two bishops together are nearly always worth more than two knights. Generally, the BB + pawn = rook + knight. In the middlegame and in the endgame, two bishops are worth more than a rook and two pawns. Two bishops and a rook + pawn are about equal to a knight and two rooks.

**Having the advantage of the bishop pair is generally worth at least half of a pawn.** It depends to some extent on how many pawns are left on the board. Generally, when most of the pawns are left, the pair is not quite worth a half a pawn, but when half or more of the pawns are gone, the pair can be worth more than half a pawn.

**ROOKS:** The elementary guides teach us that a rook is approximately equal to a minor piece and two pawns. Many players reach master level believing this. Actually, a rook for a piece and one pawn is often equal. A rook is only more valuable than a bishop as long as suitable use is made of its powers. **Having a rook on the seventh rank is worth about a pawn.**

A rook and one pawn are not equal to two minor pieces in the opening. In fact, if the minor pieces are the bishop pair, even two pawns are not enough.

In the opening and middlegame, a rook and two pawns are equal or slightly weaker than two knights (especially in a closed position), equal or slightly weaker than a bishop and knight, and weaker than two bishops. In the middlegame, the two minor pieces are usually better, but in the endgame, the side with the rook usually has the advantage. **If you have a rook vs. two minor pieces, you should exchange queens.** With a rook vs. bishop + knight

(or two knights), exchanging queens is worth a pawn.

A rook is almost equal in the case of rook + two pawns vs. knight + four pawns; but, with a rook vs. knight and two pawns, the side with the knight is usually better. The side with the rook should try to exchange major pieces (which is an exception to the rule that the weaker side should avoid exchanges).

A rook and two pawns are worth slightly less than knight and a bishop in the middle-game. In the endgame, a rook and one pawn is worth less than a knight and bishop, but a rook and two pawns can be better for the side with the rook (especially in an endgame with only a few pieces or if there are passed pawns on both wings). The player with the two pieces usually does best with a direct attack on the king because the rook will be stronger in the endgame.

With a rook and knight vs. two bishops and pawn, with no other pieces (but some pawns) on the board, the side with the rook has a slight advantage. If a rook is added to each side, it is equal. If there are pieces on the board, consider the imbalance to be about equal, with a slight advantage for the player with the rook.

With two rooks and two pawns vs. two minor pieces and a rook, the side with the two rooks should try to exchange major pieces even if slightly behind in material. This is because there is some redundancy with having two rooks.

A rook plus two bishops is about equal to two rooks and a knight. Two rooks are usually slightly weaker than two minor pieces and a rook, slightly weaker than three minor pieces (especially if they include the bishop pair), and slightly stronger than a queen.

**Two rooks are usually equal to (and sometimes stronger than) a queen in the opening and early middlegame. With no other pieces left on the board, the two rooks are usually stronger.** This is because the rooks can protect each other but the queen cannot protect itself. Another way to demonstrate this is if your opponent's queen attacks one of your pawns, your

queen can defend it, but if the opponent's two rooks attack the same pawn, the queen cannot defend it. If there are no other pieces on the board, two rooks are frequently equivalent to a queen + pawn. Two rooks can force checkmate by themselves; a queen cannot. On the other hand, if there are other pieces (or even a pawn) on the board, the queen may prevail because the queen needs an assistant to work with in order to generate a mating attack.

Generally, with a queen vs. two rooks, the advantage to the side with the rooks goes from slight (with five to eight pawns each) to almost a half a pawn (with four or fewer pawns each). With no other pieces left on the board, the rooks are stronger by almost a pawn.

**QUEENS:** It has been accepted for a long time that a queen is slightly better or equal to a rook, minor piece, and a pawn. Garry Kasparov has added, though, that the player without the queen must also have the bishop pair to be equal. That changes the equation slightly to  $Q + \text{minor piece} = R + BB + \text{pawn}$ . Kaufman's equation agrees well with Kasparov's assessment:  $Q = R + \text{minor piece} + 1\frac{1}{2} \text{ pawn}$  (if no BB).

**The queen is a little weaker than two rooks if there are no minor pieces on the board.** With two or more minor pieces for each side still on the board, the queen does not need pawns to be equal to two rooks. **With a lot of material on the board, the queen is as good as two rooks** because its mobility lets it get into action earlier than the rooks and it has material with which to coordinate. That means, in the opening and early middlegame, the queen is usually at equal to two rooks (and frequently stronger). As discussed above under "Rooks," the fact that a queen is not equal to two rooks can be demonstrated by the inability of the queen to defend itself (as two rooks can), to defend a pawn (or a piece) against an attack by two rooks, or to mate unaided.

The age-old rule of thumb is that a queen is worth three minor pieces. That is probably accurate if the side with the minor pieces does not have the

bishop pair. Kaufman's statistics put the pieces equal to a queen +  $\frac{1}{2}$  of a pawn. In other words, **three pieces are usually a little stronger than the queen.**

As always, there are exceptions. For example, an exception might be if there is looseness in the position or the queen can infiltrate the enemy camp, attack some pawns and force the opposing pieces onto the defensive. If the side with the pieces can unite and coordinate his forces or has plenty of squares on which the pieces are well defended, though, he can usually prevail.

Master opinion favors the side with the minor pieces by a full pawn or two. Kaufman thinks that this opinion is probably based more on openings than on endgames because the minor pieces are worth more with the rooks on the board (again, because of the slight redundancy of the major pieces). Since the side with three minor pieces would be somewhat likely to have the bishop pair, that would account for the minor pieces being a little stronger than the queen.

**In the endgame, the queen is not usually inferior to the three pieces because the queen can out maneuver them by switching from wing to wing and the queen is better at attacking exposed kings.** However, these endgames often end in draws because of perpetual check or lack of play for both sides.

If one of the three minor pieces is converted to its equivalent of three pawns (in other words, two pieces + three pawns), the two pieces and three pawns are only equal to a queen if the pawns can keep up. They are, obviously, slow in comparison with the queen.

A queen needs between  $1\frac{3}{4}$  to a little over two pawns to be equal to a rook + two minor pieces. Two minor pieces and three pawns are usually good compensation for a queen. A queen is usually stronger than a rook and a minor piece.

Averaging the slightly different (even somewhat at odds) estimates of six different grandmasters yielded the following equivalents: **The queen is**

**generally equal to or slightly stronger than  $R + N + P$ . A queen is approximately equal to or, if there are no checks available and no weaknesses, not quite as strong as  $R + B + P$ .** As always, it depends on the position.

The power of the queen decreases slightly in relative value as the endgame approaches because the power of pawns and rooks grow, and because the queen needs assistance from pieces or pawns in order to develop mating threats.

In some closed positions, you can sacrifice the queen for two minor pieces and get a positional advantage if the remaining position leaves you with well-placed minor pieces that cannot be driven off and your opponent's queen cannot find any targets, or you gain control of a color complex.

**THE EXCHANGE:** The exchange (a minor piece for a rook) is worth approximately a half a piece or roughly one third of a rook. The real value depends mostly on the amount of material on the board. The more major pieces on the board the better for the side with the minor piece (the side giving up the rook in the exchange). Each pawn that is removed is better for the side with the rook because of the added open files. More than 3-4 pawns on the board is good for the minor side, fewer than 3-4 pawns is good for the rook side.

**TWO MINOR PIECES:** In an active middlegame, two pieces are usually better than a rook and a pawn (maybe even a rook plus two pawns). In the endgame, two knights are about equal to a rook and a pawn, a bishop plus knight is equal or a little stronger than a rook and a pawn, and the bishop pair is worth a rook and two pawns (even though the rook's value increases more than the value of the bishops in the endgame).

**If you have two minor pieces vs. a rook, you should avoid exchanging queens.** This is based on Kaufman's redundancy concept again. One major piece controlling an open rank or file could be a big advantage (maybe even a

decisive one), but more than one piece is likely to bring diminished returns because of the duplication of the powers of the pieces. With a bishop and knight or two knights vs. a rook, the exchange of queens is equivalent to losing a pawn (for the minor piece side).

You can see the redundancy principle at work with two bishops and pawn vs. rook and knight. If there is nothing but pawns on the board, the rook side has a slight advantage. However, if you add a rook to each side, the advantage disappears. With other pieces on the board, the advantage also nearly vanishes.

**Two minor pieces and three pawns are usually enough compensation for a queen. Two minor pieces and a rook are usually much better than a queen.**

**THREE MINOR PIECES: Three pieces are usually better than two rooks.** Three pieces are usually much better than a queen in the opening and middlegame (when the pieces can team up against targets). An exception can happen if the queen can penetrate, attack some pawns and her side can get the initiative. Master opinion favors the side with the minor pieces by a full pawn or two (see the discussion under “queens” above).

The reason three minor pieces are usually better than a queen is at least partly explained by the fact that the three pieces attack more squares than the queen does. In other words, their combined mobility is greater than the queen’s is. Therefore, **the best way to exploit the imbalance of three pieces vs. the queen is for the side with the three pieces to attack the king.**

In the endgame, though, the queen may prevail. In the endgame, the queen can generally outflank the pieces by switching from wing to wing and has an advantage when it comes to harassing an exposed king. Often, the endgame of three pieces vs. queen will end in a draw from perpetual check or because neither side has enough power to force concessions from the other.

The queen does better in open positions with widely scattered material so it can make the most of its mobility and forking abilities. The three pieces will

do better with everything being protected. With three pieces vs. a queen, the initiative is important.

**PAWNS: Two mobile, passed center pawns on the fifth rank are usually worth a minor piece. Two connected pawns on the sixth rank are equal to or stronger than a rook.**

As the material on the board is reduced, wing pawns become more valuable than center pawns. The breakeven point, determined mathematically by Han Berliner (*The System*) is at about 14 units of material (each) left on the board. With less than 14 units (each) on the board, the wing pawns become more valuable than center pawns.

**Three united passed pawns are usually better than a minor piece in the endgame**, but in the opening and middlegame the piece is usually better because it might be able to be used in a successful attack before the pawns can be advanced. Consequently, the side with the piece should play actively to keep the initiative; otherwise, the player with the pawns can advance his pawns or go for simplification and head for the endgame.

The value of the pawns increases if the queens are off the board, or if anything is off the board for that matter (because the power of the pawns increases as the material decreases). The ultimate example of the superiority of the pawns in the endgame would be three pawns vs. a knight. In that case, only the pawns have winning chances.

Again, I would like to thank GM Larry Kaufman for some valuable input in this section. Please understand that Mr. Kaufman does not necessarily agree with everything that is said here, he was merely kind enough to help me out with parts of the section. Moreover, the values in this section (as well as everything in this book) are the summary of opinions of hundreds or thousands of experts... and that many people (even experts) hardly ever completely agree about anything!

# DYNAMICS

*Dynamic moves based on ignorance tend to be better than passive moves based on fear.*

—Jeremy Silman, *The Amateur's Mind*

## **DYNAMIC VS. STATIC**

In the early 1900's, a lot of attention was devoted to static pawn structure weaknesses. It was considered to be of paramount importance. Modern chess has evolved a lot since the days of Steinitz and Tarrasch. Now, **top players place a lot more emphasis on the dynamic possibilities of a position in both evaluation and decision-making.** At least some of the change in attitude has been because of the emergence of a variety of unconventional opening systems, some of which involve the early push of wing pawns, a technique that was considered highly unprincipled in the those earlier days.

**Dynamics is about short-term play and the emphasis on piece play over pawn structure.** The choice between a static and a dynamic approach to a position, in contemporary chess, comes down to whether the immediate power of the dynamic potential will be enough to gain a decisive advantage before the static, long-term, advantages come into play.

**The extreme dynamic position is that static advantages matter only if they allow for dynamic play. Pieces come before pawns. In other words, pawn structure is important only to the extent that it has an effect on the power and mobility of the pieces.**

Dynamic play is now considered a major strategic element of a position and almost any kind of weakness can be justified if the dynamic compensation (for example, active pieces or a lead in development) is sufficient.



Piece development, mobility, activity and the initiative are the main factors of dynamic play. The interaction of the pieces is the most important element of dynamics. If you allow static weaknesses, you must get dynamic compensation.

It is important to understand that dynamic advantages are not always better than static ones. As always, it depends on the position. If the dynamic advantages can be equalized, then the static advantages can take over. **If you are playing dynamically, you must not let up**, because your opponent is probably collecting static advantages as you go. Some positions do not have a dynamic character. Sometimes, a slow positional game is called for and you should not force the matter (if it is not dynamic).

In order to assess dynamic positions properly, you should first calculate the forcing lines to conclusion, and then do the evaluation. Next, identify the static and dynamic advantages (and know which is which). Then, you should have a good idea of what kind of a move you are looking for. With this in mind, you should shape the position to favor your pieces and position.

## ***ACTIVITY***

Other than king safety, **active placement of the pieces is probably the most important of all of the positional factors**. It is not just the amount of material that matters in chess, but also the activity of the pieces and their ability to play a vital role where the critical action is taking place.

Activity and mobility are similar and related concepts. Mobility is a measure of the number of squares to which a piece has access. Activity is a subjective measure of the value of the squares controlled by a piece (preferably central squares or squares on the opponent's half). It is connected with such ideas as attacking key squares, attacking other pieces, outposts, piece coordination, controlling open files, dynamics, and hindrance. **An active piece does good work**. "If a piece is able to intervene energetically in the events

taking place on the board, such a piece is said to be active” (Aleksander Kostyev, *40 Lessons for the Club Player*).

Mobility is quantitative, whereas activity is qualitative. **The value of a piece depends on its activity.** “The dynamic value of pieces and pawns is directly proportional to their scope of action and ability to work powerfully” (Robert Bellin & Pietro Ponzetto, *Test Your Positional Play*). An active piece attacks something, generates threats or threatens to threaten something.

Having better squares for your pieces, means that your opponent cannot occupy or control those squares. If you control most of the important or critical squares, you have a sizable advantage. That advantage can last from the opening into the middlegame and can continue into the endgame. However, you cannot measure activity just by the number of squares a piece controls. A piece controlling a crucial square can be more important than a piece that is controlling several less important squares. In addition, a piece involved in an attack can be more valuable than a piece that is magnificently well placed.

**You should activate all of your pieces, not just some of them.** An inactive piece is about as good as a piece that has been captured; it is not doing anything constructive. A rule of thumb regarding active pieces is **it is best to leave active pieces where they are.**

In dynamic positions, piece activity is the area in which most of the mistakes are made. Usually, an inferior dynamic move is better than a passive move. The best chance for an opponent to get a tactical advantage is when you play passively. Passive positions often lead to a loss. You should avoid passive positions without adequate compensation. **Keep active and prevent your opponent from becoming active.** If your opponent is more active than you are he can reasonably attack, has more flexibility, and has better tactical chances.

Luděk Pachman, in his *Modern Chess Tactics*, said that the effectiveness of the pieces can be increased in, basically, the following ways:

- by piece regrouping
- by removal of one's own or the opponent's pawns from the line of pieces (clearing of files or diagonals)
- by clearing a square for a particular piece
- by the removal of one's own or the opponent's pieces from the line

## **INITIATIVE**

“I never give up the initiative for material gain” (Eduard Gufeld, *Chess Art and Struggle*). “**Initiative is the soul of the game**” (Roman Dzindzichashvili, *Roman's Lab*, Vol. 4, DVD). “**The initiative is above everything!**” (Sergei Soloviov, *Super Tournaments 2003*). “Don't hang onto material at the cost of the initiative! **initiative comes first!**” (Vlastimil Hort & Vlastimil Jansa, *The Best Move*). “**Wrest the initiative**” (John Grefe, *Progressing through Chess*).

**WHY:** The initiative is the attack. It is having the ball. It is the capacity to initiate dynamic operations. **It is control.** It is having the overall control of events. Having the initiative enables you to set the course of the game, to pursue your own plan. Having it is normally a sign of who is in control of the game. With it, you can attack, while putting your opponent on the defensive (which diverts him from starting a counterattack). With the initiative, deep calculation is often not needed. By attacking your opponent's pieces and creating threats on each move, you often create a dangerous attack.

When there is an imbalance in material, having the initiative can be decisive. When you have the initiative, you are in charge; it is difficult for your opponent to develop a strategy when you are deciding the course of the game.

Having the initiative with the pieces in the middlegame is a better advantage than having the healthier pawn structure. With the initiative, if there are complications, you are the more likely to come out on top. If you create enough problems for your opponent, he will probably start making serious mistakes because of time constraints. “It's easier to act than react. A

player who ignores the initiative is like a boxer who allows his opponent a free swing” (Bruce Pandolfini, *Principles of the New Chess*).

**WHEN:** White starts with the initiative because he has the first move. In the middle-game, when you have opposite-colored bishops, it is essential to get the initiative and put your opponent on the defense. **If your opponent plays passively or there is a material imbalance, you should seize the initiative.** If the game gets complicated and there are a lot of checks and captures, **it is generally right to make a check, capture, or even a threat, to get or to keep the initiative.** “One of my favorite quotes is from Alekhine who claimed that a strong player would always prefer to have an advantage with material equality and the initiative, than to have a material advantage but have to defend it” (Jacob Aagaard, *Excelling at Technical Chess*).

**HOW:** One way to get the initiative is by playing an opening gambit or by making a material sacrifice. Openings are based on the fight for the initiative. Be aggressive. Sacrificing a pawn or two for quick development is another way to get the initiative. Playing accurately is important after a sacrifice because, if the initiative is lost, the material loss could become decisive. **If you have the initiative and your opponent sacrifices material, you should consider refusing it. Do not accept it if it means losing the initiative.**

Having coordinated pieces, preserving (not wasting) time (tempo), and having flexibility help to keep the initiative. Certain positional advantages (for example, more space and better development) make it possible to gain the initiative.

Moves chosen, with the idea of a draw in mind, because they are quiet, cautious, or passive, usually do not lead to a draw, but to conceding the initiative to the opponent and to a loss. Accordingly, **you should not trade pieces if you have the initiative.**

Having a plan and carrying it out should get you an initiative. The initiative, as a rule, goes to the player that gets his plan functioning first. If you

have a basic plan, by carrying it out you will be likely to develop an enduring initiative.

It is often justified to allow weaknesses in order to obtain the initiative, but the initiative is frequently temporary and the weaknesses long lasting. For these reasons, you should weigh the compensation carefully.

If you have the initiative you must try to keep it; losing it rarely improves your position. You should try to increase your mobility, play actively, and create threats. Normally, you should take action on the flank where you have the initiative. Keep your opponent on the defense and prevent him from consolidating his position. If your opponent has the initiative, you must try to get it away from him. “One of the most important rules of play in dynamic positions is ‘fight for the initiative, and once obtained, hold on to it and develop it!’” (Valeri Beim, *Paul Morphy, A Modern Perspective*).

When you are convinced that you have a strong initiative and the opponent blocks your chosen line of attack, don't become disillusioned. Instead, look around for some other route into his position. If chess is a logical game and your judgment is right, there is sure to be one right under your nose. (Neil McDonald, *Chess Secrets: The Giants of Power Play*)

**DEFENSE:** If your opponent gained the initiative from a sacrifice that was not completely sound, it is often a good idea to return the material at the right time in order to neutralize or regain the initiative. Some players make mistakes as soon as they gain the initiative. Watch out for them.

The opponent's initiative will get more powerful if it is not challenged. One way to stop his initiative is to counter with your own initiative on another part of the board. **Counterplay is usually the best way to counteract an opponent's initiative and to seize it back.** Try to combine defense with a counterattack. It is not usually wise just to defend. Passive defense is only a practical option as a last resort in the rarest of terrible positions.

## **TRANSFORMATION**

In chess, force can be converted into material and material can be converted into force. Every move gives some benefit away and takes others in return. It is a dynamic process. Advantages are only valid if they can be transformed. **Advantages, such as the initiative and space, are usually temporary, but material advantages tend to last a long time.** The ability to transform temporary advantages into more permanent ones is one of the most important skills in chess.

The timing of a transformation is important. Often, there are times when positional factors need to be transformed into other kinds of factors. **If you miss the opportunity to transform your advantages, the opportunity might be lost for good.**

A sacrifice is an example of an attempt to transform material into another form. When material is sacrificed soundly, it either ultimately wins material or gains an advantage, such as the initiative.

Space and the initiative are related in that they acquire power from each other and depend on each other. Gaining space usually implies developing an initiative. More space allows more mobility for the pieces which, because of their increased mobility, are able to conquer still more space or material; as a result, space is converted to material.

When an attack reaches its height, often the initiative is transformed into material. If you have a good attack going against the opponent's king and you have the chance to win decisive material in exchange for losing the momentum, it might be best to do it. At least, you should consider it.

Another example of transformation would be the process of taking several moves for a piece to get to an ideal post. The tempos that were used in getting to the post have been transformed into the value of the piece. An exchange of this piece not only includes the material, but the time that went into getting it to its powerful post.

Some people have a hard time being flexible enough to adapt to the concept, but the transformation of positional factors is one of the most important facets of the game. Always be flexible and willing to convert advantages from one form to another. The intricate balance of transformations is at the heart of chess.

# TACTICAL

*Chess is 99% tactics.*

—Richard Teichmann

“Tactics” does not only mean “combinations.” In a broad sense, tactics are short-range concepts (as opposed to longer-range “strategical concepts), or specific sequences of moves (as opposed to a more general plan).

Tactics are so important in chess that the qualification “unless there is a tactic” applies to almost all non-tactical principles! “Tactics are almost always much more important than activity” (Dan Heisman, *Back to Basics: Tactics*). “Tactics decide all chess games” (Ron Curry, *Win at Chess*).

Chess is 99% tactics. Anatoly Karpov’s reaction to that truism was ‘What rubbish!’ He, of course, being one of the best tacticians ever, might have underestimated the significance of his prowess in that particular department of the game. IM William Hartston even went so far as to state that there is no such thing as a good strategist; **the best players are simply the best tacticians.** (James Plaskett, *Can You Be a Tactical Chess Genius?*)

Nothing can make up for a lack of tactical competence. If you do not have it, you cannot play good chess. It is the dominant factor in chess ability. **You must acquire tactical proficiency if you want to become a good chess player.** It is almost impossible to win a game without at least one tactical encounter. It is important to initiate the clash on your terms, not the opponent’s terms. Tactics are involved in just about everything that happens in a game. The difference between class players and experts is tactics. The difference between experts and masters is tactics. As well as, the difference



between IM's and GM's is tactics. The stronger players "see" more. He is more attuned to the combinations inherent in the position. That is why he can give a handicap to the lower-rated player.

Almost every game is won or lost because of a tactical skirmish. Tactics are involved from the first move of a game to the last. To excel at tactics you need to develop your imagination, intuition, tactical vision, and ability to calculate.

At the board, a player must be continually aware of tactics as it is these that effectively decide the outcome of the game. The knack is to know when to look for a tactic and just as importantly how to create the right conditions for the setting of a trap or conjuring up of a trick. (Gary Lane, *Sharpen Your Chess Tactics in 7 Days*)

## ***FINDING TACTICS***

**WHEN:** If you search for tactics and do not find any, you lose time. If you do not search and the tactics were there and you missed them, you might have missed a quick win. Worse, you might have missed a killer tactic for your opponent. So, when do you spend the time searching for potential tactics? **There is no point looking for a tactical shot when you or your opponent have no weaknesses.** On the other hand, **if there are weaknesses or there are any unusual piece placements, scrutinize the position deeply for tactics. In complicated positions, you should look at almost all possible moves.** Even though you might not look for tactics on every move, **you should look at every possible check and capture (for both you and your opponent) on every move.**

We could try to answer the question "why are actually tactics sometimes working, and sometimes not?" How does one come, at all, to an idea of

using tactics in a certain position? Well, the thing is that **there are always certain features which help us feel that tactics could be working. And, usually this is some advantage that we have in the position.**

(Rustam Kasimdzhanov, *Fritztrainer, Middlegame, Tactical Strength*, DVD)

Your opponents will consistently give you tactical opportunities. You have to notice them and act immediately when you do. In the opening, there can be a little complacency, because the forces are not fully developed. Yet, for the same reason (lack of development), the pieces are not always well defended and that allows for an excellent opportunity for unexpected tactics.

**LOOKFOR:** Before a good combination can be possible, there has to have been a mistake made by your opponent. At a minimum, every move causes a weakness or leaves something less defended. So, look to see what the opponent's last move made more vulnerable.

In order to win material, gain positional advantages or to checkmate your opponent, **you have to learn how to recognize, create, and attack weaknesses.** Start by looking for weaknesses near the opponent's king. Then, look at possible ways to win a piece, starting with the queen and working down to a pawn. **Every good tactic is based on at least one weakness in your opponent's position.**

Tactics flow from superior positions. **Good positional play will set you up for tactical opportunities.** The tactical opportunities spring from some advantage that we have in the position.

Usually, you can find the great moves that are sometimes in a position only if you consciously search for them. Look for far-fetched, absurd, extraordinary possibilities. Let your mind be creative. Especially, when it is your opponent's move, imagine possible positions that would arise if your opponent's pieces were on a different square. This can help you discover decoy and deflection combinations.

Try to make the position conform to what you want it to be. A well-known

saying in chess is “If it doesn’t work, but you really want it to, then it must work!” If you think about it hard enough, you can often find the hidden means to make almost anything work.

**Consider any sacrifice that draws the enemy king out and check the resulting variations thoroughly.** Tactics usually go against the player who is defending a difficult position.

Unguarded pieces are vulnerable to forks and pins. Remember the catchphrase “loose pieces drop off.” It is not always bad to leave a piece unprotected, but it is always something to look for when looking for tactics. Even grandmasters sometimes forget to keep their pieces protected.

Isn’t there a simple rule or point of reference that would allow the amateur to increase his tactical awareness? Actually, there is! **Almost all combinations are made possible by an undefended or inadequately guarded piece. This means that whenever you see a piece** that is “loose,” perk up and look for a trick to take advantage of it. (Jeremy Silman, *Reassess Your Chess Workbook*)

**METHODS:** A piece might be vulnerable if it is not protected at least as many times as it is attacked. Its vulnerability also depends on the value of the defending pieces relative to the value of the attacking pieces. If you find a good move that is prevented by a defending piece, look for a way to eliminate the defending piece (removal of the guard). If there is a vacant square where it would be beneficial to you to have an opponent’s piece, you should try to lure the piece there.

One method is to look for a move that you would like to make without considering the tactics involved. Then, try to find a tactical way to make it work. **By visualizing the desired outcome, it will be easier to find the moves to make it happen.** Containing and limiting your opponent’s choices so that he is left with only inferior moves will lead to good tactical

opportunities for you.

**Tactics and calculating variations are almost one in the same.** When you know what you want to do, try different move orders. **Many times the move order of a combination matters.** Check the various move orders for captures and recaptures.

You can create the means for a discovered attack by moving an attacking piece to a position behind a piece that is capable of giving check. Sometimes, just creating the threat can be beneficial because your opponent will have to lose a tempo in order to defend against the discovery. Regardless of how many pieces and pawns there are between the outside pieces (or king), as long as the outside piece can attack along the same line, there is the potential for a discovered attack.

Create targets and pressure the opponent. Do not just react to his threats. **If you have more than one check to choose from, probably it is best to choose the one that develops a piece or adds power to the attack.** Finding tactics is easier if you consider the function of a piece in the current position rather than its nominal material value.

Trust your experience and intuition. If you sense that a good move is there, spend a little time looking for it. Look at the position as though it was a puzzle and you knew that there was a winning move to be found. **If you find a good move, do not make it without looking to see if you can find a better one.** In addition, do not forget to look at the board from your opponent's standpoint.

**MISSED:** Good positional play will lead to tactical opportunities, but good positional play does not matter if you miss the tactics. Even strong players will miss obvious tactics if the first move would be considered a positional error under normal conditions. In general, though, if you miss a chance to decide a game with a tactical shot and another chance comes up, it is usually more complicated and harder to spot. "The 'computer era' of chess has emphasized

that we all miss tactical opportunities from time to time, and this also happens at grandmaster level” (Christian Kongsted, *Beat the Grandmasters*).

## **DOUBLE ATTACK**

**The double attack is a combination of attacks and threats and is at the heart of most tactics.** The concept of creating two or more simultaneous threats at once is fundamental to the double attack. Two simultaneous threats at once are hard, and often impossible, to meet. A double check against the king means the king has to move. If it cannot move, it is checkmate (referred to as the double mate).

The double attack usually arises because of carelessness or a mistake on the part of the victim. It can be the result of underestimating the opponent’s motives, or it can be the consequence of a miscalculation.

Every piece and pawn is capable of executing a double attack. “Remember that **the weaker the unit making the double attack, the stronger the threat**—because a capture is almost sure to show a profit” (Charles Alexander & T.J. Beach, *Learn Chess: A new way for all, Vol. 2: winning methods*).

**Look for a double attack if you see any unguarded or insufficiently guarded pieces or pawns.** If the king is exposed, look for a check with a possible secondary threat. You can often set up a double attack by decoying the king to the key square by way of a sacrifice.

The most common type of double attack is the fork, but the skewer is also a form of double attack. A skewer is accomplished when two attacked pieces are on the same line and the second piece is indirectly attacked “through” the first one.

“Double attacks are by no means invariably successful. It can sometimes happen that a simple attack may prove more effective, but **it is normally more difficult to defend against a double attack**” (Igor Bondarevsky, *Combinations in the Middlegame*).

## ***FORKS***

All pieces can fork. The fork is the simplest form of a double attack.

**Pieces are susceptible to knight forks if they are separated by one or three squares on the same rank or file.** Pieces can be forked by a knight if they are on the same diagonal and on adjacent squares or at the corners of any 4×2 or 5×3 boxes.

**Your pieces are safe from being forked by a knight if they are separated by one square on the same diagonal (or by an even number of squares on a rank or file).**

## ***OVERLOADING***

Often, a piece is defending more than one piece, pawn or square at the same time. Players will often use one piece to perform several functions at the same time (like controlling key squares, guarding weaknesses, or performing threats). The piece, then, may be overloaded. If so, you can often take advantage of the situation with a tactical blow.

Do not encumber your pieces with too many responsibilities. If you allow one or more of your pieces to be overloaded, you can provide your opponent with the opportunity to exploit the fact that the piece is tied to the defense of these points. **Anytime there is an overloaded piece there is an opportunity for a combination**, so it is best to avoid overloading your pieces. “Quite often, it happens that a piece which is performing a few defensive functions simultaneously is overloaded with assignments. Noticing it, and with the help of a tactical stroke, we take advantage of the situation” (Eduard Gufeld, *Improving Chess by Tactics*).

## ***TACTICAL WEAKNESS***

A tactical weakness (as opposed to a static, strategic or positional weakness) is a short-term weakness, such as an undefended piece, an overloaded piece, a trapped piece, or a potential fork or pin. **If your opponent presents you with a tactical weakness, you need to take advantage of it right away** because it might only last for a move or two (and the way to win chess games is to attack weaknesses).

## ***TACTICAL ERRORS***

In a game of chess, **errors made (even by masters) are usually tactical**. They can be the result of poor calculation. Either the calculation is not accurate, not sufficient or an unforeseen move or a detail is missed.

**Tactical errors are usually punished much more severely than strategic errors** and they are often decisive. **In a tactical battle, it is usually a mistake to remove a piece from the battlefield** (because every piece counts). **Tactical errors are often made by making automatic or obvious moves, such as recaptures and checks**. Resist the urge to make these kinds of moves without looking at all the possibilities first.

**Another example of a tactical error would be to drive an opponent's piece to a better square**. Even if it is undefended, leave the piece alone rather than drive it to a better post. Besides, it might become a good target later if it is left undefended where it is.

## ***TACTICAL THEMES***

**General principles are usually secondary to tactics**. You cannot apply general principles to tactical situations without serious consideration. Careful thought is necessary. The majority of combinations and tactics, though, are based on basic themes. **Even the most complex combination is usually based on a simple, basic, tactical theme**. Here are some of the signs to look

for (and look at them from both sides). Keep in mind that the move you are looking for might not be the first move of a sequence, but possibly the second or third move:

**LONG LIST OF WHAT TO LOOK FOR:** To help you with what to look for, here is a long list of suggestions:

- every check, capture, threat and forcing move
- three or more pieces attacking the opponent's king
- king and queen on the same line (no matter how many pieces are between)
- a piece that can be attacked by a piece of lesser value, encircled or cut off
- all moves that are disruptive or interruptive
- sacrifices, clearance sacrifice or annihilation
- batteries (doubled or tripled pieces on a file, rank, or diagonal aimed at an enemy piece or important square)
- cornered, unprotected, loosely protected, or exposed, or cramped king (opponent's own pieces block escape)
- two pieces separated by one or three squares on rank or file (possible pawn fork)
- two adjacent pieces on diagonal (possible pawn fork)
- an unstable or overloaded piece (guarding more than one piece or square)
- remoteness of pieces from king's defense
- weak squares in the vicinity of king
- a pinned piece or vulnerable pawn
- loose pieces
- inadequately guarded pieces
- pieces with no retreat
- a gain of tempo
- weak squares
- x-rays



- misplaced pieces
- pawn structure weaknesses
- uncoordinated pieces
- advanced pawns
- king caught in the center
- active pieces
- lack of mobility
- open ranks, files and diagonals
- trapping a piece
- stalemated king
- possible threats
- discovered attacks
- double attacks
- double checks
- vulnerable back rank
- zwischenzugs or zwischenschachs
- potential pins
- vulnerable vital guards
- superior force
- interpositions
- skewers
- forks
- removing the defender
- forced repetitions
- perpetual checks
- surprise moves
- quiet moves
- windmills
- deflections
- lagging development

- outnumbered forces in a sector
- an interference
- possible pawn promotions
- and desperadoes

Sometimes, an advantage in space, time or the cooperation between the pieces is strong enough that it suggests or becomes a tactical theme in itself. Active piece placement leads to tactics.

**PINS, DEFENSE:** The pinned piece cannot defend itself against additional attacks and its defensive power is nonexistent. A pinned piece cannot defend anything else either. Do not neglect a pin. It is an early warning of a threat. **It is important to break pins as soon as possible.** Remember the immortal words of I. A. Horowitz: “The pin is mightier than the sword.”

You can defend against a pin by:

- removing the pinning piece by capturing it or by driving it off
- pinning the piece that is doing the pinning
- unpinning the pinned piece by putting another piece between the pinned piece and the object of its attack
- by disregarding the pin by initiating forceful play that takes precedence over the pin

**PINS, OFFENSE:** Bishops, rooks and queens are able to pin, but kings, knights and pawns cannot. You should generally attack pinned pieces with pieces of less value, but it is usually a mistake to think that the pinned piece must be of greater value than the pinning piece.

**Do not capture a pinned piece unless it is beneficial or you cannot maintain the pin.** The threat is often stronger than the execution. Increase the pressure on a pinned piece by doubling or tripling on the pinned piece until it becomes indefensible. **To attain the most power in a pin with**

**multiple pieces, it is best to have the strongest pieces at the back of the line.**

A pin can be turned into a discovered attack. As a rule, do not pin your opponent's king knight by playing B-KN5 before he has castled.

**ZWISCHENZUG:** Sometimes, a combination will only work if a zwischenzug gains a tempo or plays another decisive role. Zwischenzugs are easily overlooked because they do not actually fit in with the theme. The zwischenzug is usually missed by the player who conceives the combination and found by the defender, who has a different, often more critical, look at it. You must determine that all of the potential zwischenzugs are harmless before you can consider a combinative conception to be a sound one.

## ***TACTICAL THREATS***

**The foundation of every tactical combination is the threat.** The aim of the threat can be the opponent's king; it can be for the gain of material, to create weaknesses, or to exchange attacking forces. If any of your opponent's pieces are undeveloped, make threats. Moreover, when you create threats, make more than one at a time.

## ***TACTICS, POSITIONAL PLAY AND STRATEGY***

Positional play and tactics are inseparable. They complement each other. Strategies are often built on tactical ideas, especially in complicated sharp positions when the key strategic goal is to get to a position that ends with a tactical shot. To paraphrase Max Euwe, tactics are a function of seeing or observing, whereas strategy is based on contemplation. **The overall plan of the game is played positionally, but the game is usually decided tactically.**

Combinations challenge or confirm positional concepts and good positional play sets the scene for good tactics. **It is difficult, if not impossible,**

**to find good tactics without fully understanding the position.** Often, you can solve tactical problems by keeping your strategic objectives in mind and, conversely, tactics can penalize poor strategic play. Consequently, in a way, we can learn practical strategic play from tactics. Consider, too, that sharp play is a strategic choice.

Tactics are so important in chess that many authorities suggest that it be given so much attention that everything else becomes subordinate to it, including strategy.

**You can win without strategy.** If you do not apply effective tactics on every move, you will not survive long... Strategy should not be a subject of inquiry for the non-master. **No strategy! Absolutely none!** Only amusing, paradoxical tactical tricks should be investigated. Chess is a funny tactical game of two-move combinations and unexpected endgames. (Rashid Ziatdinov, *Training Tips, Part 5, Tactics vs. Strategy*, [jeremysilman.com](http://jeremysilman.com))

Tactics play a big part, even in slow, maneuvering games. Strategic understanding of the position is always important, but you must be tactically on your guard at all times. A blunder can ruin a strategically won game.

In equal positions, the game cannot be decided by a tactical onslaught, but the right strategy is not necessarily to accumulate small advantages. The right path might be to sharpen the game tactically.

Combinations will usually favor the player with the better position. **Tactics can only work when there is a sufficient, existing positional advantage.** Furthermore, when the positional advantage is there, the tactics will appear. As Fischer said, "Tactics flow from a superior position." If you or your opponent makes a mistake, the superior position can change hands dramatically from one player to the other. The balance can tip drastically in one move. Consequently, you need to be alert for tactical opportunities after every move.

You can only build positional advantages up to a certain level. There comes a time in almost every game when you have to use tactics to realize your positional superiority (the time to convert the positional advantages into a tactical operation).

Strategy comes before tactics and the general priority is to favor strategy over tactics. However, there are times when the tactics can dramatically turn the game around in an instant, end the game or create a winning advantage. In those cases, you must go with the tactics. Sometimes, a tactically superior move can be strategically inferior and there are times when minor tactic needs immediate attention. In both cases, take a hard look at the variations. If the tactics fail and you are left with an inferior positional game as a result, it could cost you the game.

Before every move, you should know if there are tactics available in the position. If you are not sure, look for them. As long as there are no combinations looming for either side, plan. If there is a combination available, decide whether it is more beneficial to initiate (or allow) it, or to proceed with your plan. **You should choose tactics over strategy only if the tactics lead to an obviously clear advantage.** However, because tactics can be suddenly and unexpectedly critical, you should look at candidate moves first for tactics that result in a concrete benefit for either side. Work out the tactics first. If you do not find any useful tactics, then use positional considerations conforming to your strategy to make your move choice.

If one's position has been constructed on a sound basis, then the chances that it will be demolished by a random tactic are rather small—it can happen, of course, and ideally, one should check all such possibilities. However, it can be time-consuming to look for tactical lines every single, and at some point, one has to trust one's intuition that there won't be an unexpected knockout blow. Don't believe that grandmasters look at everything. (John Nunn, *Grandmaster Chess*)

## **COMBINATIONS**

Tactics and combinations are related. A tactic can be one move; a combination must involve at least two moves and it can be made up of a long sequence of moves. Combinations can be made up of a series of tactics. Many of the same themes apply to both tactics and combinations. The “long List” under “Tactical Themes,” for example, will generally apply to combinations as well.

**Combinations are the most effective way of obtaining an advantage.** Combinations are also used to create a checkmate. The outcome of a combination is not always just to win material or to checkmate though; frequently its purpose is to improve the position, to create an attacking setup, to create a weakness, or any number of other positional gains. **The harmonious cooperation of the pieces that comes from good positional play helps to create the proper setting for a combination.**

**Being a good combinational, or tactical, player is often more important than being a good positional player.** The player who plays combinations and tactics well, but is not well grounded positionally, will usually beat a positional player who does not have a solid tactical/combinational foundation.

If you find an unexpected and spectacular tactical reply for your opponent to a combination that you are calculating, do not give up the calculation. In those kinds of positions, quite often there is an equally amazing answer to your opponent’s move.

In his book, *Train Like a Grandmaster*, Kotov broke the possible types of combinations down to three basic types and their subdivisions, as follows:

- Mating Combinations
  1. Smothered mate
  2. The seventh and eighth ranks
  3. Verticals and diagonals
  4. Attack on weak points

5. Drawing out the king
6. Destroying the guard of the king
- Pawn Combinations
  1. The “quicksilver” pawn
  2. The pawn wedge
  3. The pawn phalanx
- The Bad Position of Pieces
  1. Double attack
  2. Trapping
  3. Pinning
  4. Line Closing
  5. Diversion
  6. Attraction
  7. Ambush
  8. Overloading

Most of these are self-explanatory. If you are unfamiliar with one or more of these, you can find them easily in almost most chess glossaries or by going online. In the interest of space, few definitions have been used in this book.

All combinations contain sacrifices (if only temporary), motifs, concepts, forced maneuvers (and their resulting blows), goals, final positions, and advantages. Combinations may contain more than one sacrifice. Botvinnik, among others, said that a combination must contain a sacrifice. That continues to be debatable.

Positional combinations are also possible. The aim of a positional combination is not to gain material, but to improve the position.

**The ability to find combinations is probably the most important attribute for a chess player to possess.** Without it, progress in chess is impossible.

**MASTERS:** There are many more combinations in master play than meets

the eye. Most of the combinations are contemplated (but not played) because the opponent anticipated them and rendered them unplayable. Nevertheless, some of the most fantastic combinations are often played against the strongest opponents. “Strange as it may seem, the most brilliant combinations are often brought off against the strongest opposition” (Irving Chernev, *Combinations, The Heart of Chess*).

**PATTERNS:** No matter how simple, complicated, original or traditional, **most combinations are based on a solid tactical understanding and on known patterns.** Professionals find more combinations, and find them faster, than amateurs because they have many more patterns stored in their memories than amateurs do. When professionals see a pattern on the board, they know immediately what move to make. It is mostly a matter of learning the patterns.

There is a well-known and well-agreed-upon observation that **if you do not immediately spot a tactic or a combination that exists on the board, you are not likely to find it at all.** There is a diminishing return associated with looking for tactics: the longer you spend looking, the less likely you are to find them. That is a function of pattern recognition. It is also a truism that, **if you fail to see a mating combination that exists against your opponent, you are likely to become the victim of a mating combination yourself.**

**You should not waste too much time looking for combinations in tournament games.** The better players develop a sense for what to play. They develop a tactical instinct. They know when a combination is likely to be lurking in the position. Moreover, they only spend the time looking for it when they know it is there.

**LOOK FOR:** There are clues that a combination might be available in the position. Many of them were listed in the “Long List” under “Tactical Themes” earlier. In addition, **you can find clues by looking for any deviation from normal.** Even the slightest deviation can signal an opportunity. Use your



imagination and powers of fantasy. “Moves that follow a plan have a reasonable “look” about them. **Moves that force big gains, combinative moves, often look at first sight quite unreasonable**” (Cecil Purdy, *C.J.S. Purdy’s Fine Art of Chess Annotation*). **Every good combination is based on some form of weakness**; therefore, look for weaknesses. In addition, having a material advantage can be the precondition for a combination.

There are clues to every combination: lack of development, an unguarded long diagonal, a piece out of place, out of play, or unguarded, a king hemmed in or in a corner, a disarray of pawns, open files upon the king, an advanced pawn, and many others. In every position that admits of a combination, there will be some deviation, however slight, from the normal. (David Hooper & Bernard Cafferty, *Play For Mate*)

All combinations have positional foundations. **All combinations have some form of a forcing double threat or multiple threats involved.** Almost all combinations are based on the finely tuned coordination of the pieces, or the coordination of the pieces and pawns. To be successful, the more material sacrificed in the execution of a combination, the more coordinated the remaining pieces need to be.

Always be alert to the possibility of the appearance of a combination (for either you or your opponent). Still, do not spend a lot of time looking for one until someone has a positional advantage. **Combinations appear in superior positions.** It is essential, then, to prepare for a combination by making good preparatory moves. If you have a superior position, you should look for a combination. Look for the unusual move, the exceptions. If your opponent has a superior position, be alert to his combinational possibilities.

**You cannot create a combination if it is not there.** Either it is there or it is not. If it is there, it is a matter of finding it. **It is also impossible to find a winning combination in an inferior position** (if a winning combination was

found, it would refute the claim that the position was, in fact, inferior in the first place). Generally, **possibilities for a combination come about as the result of poor play or a mistake**. So, if your opponent has not done anything wrong, there is no sense looking for a combination

**HOW:** The first step in creating a combination is to find it. Do this by studying the position, looking for weaknesses. When you get an idea, calculate. Evaluate what you have calculated. Then, make the decision whether to play the combination.

A good background in the typical mating combinations makes even the most complicated combinations much easier. Do not play a complicated or brilliant combination if a simple and safe win is available.

In a combination, you usually use only active moves (such as checks, threats, captures, and attacks). **When preparing a combination, look for forcing moves and moves that have more than one function**. If the moves are not forcing, try at least to find moves that have few options. Otherwise, the calculation can be too difficult to rely on. Always look at intermediate moves that can gain a tempo.

Sometimes, a combination only works because somewhere on the way to the final position the attacker gains a tempo with an intermediate move. This gain of tempo often comes as a surprise; therefore, **a combination with an intermediate move is harder to spot and defend against**.

(Martin Weteschnik, *Understanding Chess Tactics*)

Before you start the combination, be sure to have a clear picture of the final position in your mind. Then, you need to have a correct and accurate assessment of that position. Is it favorable? Then, **try to go at least one more move deep in the calculation for safety**.

**If, in the combination under consideration, your opponent will have some move order options, try to give them to him before you are totally**

**committed.** This is usually early in the combination.

In practice, you should think your way through each move in the exchange series, keeping alert for possible ways in which either you or your opponent can break out of the series. It may help for you to think through the full series of captures first and then to go back over the sequence, looking for possible variations. (Dr. Leslie Ault, *The Chess Tutor*)

Here are three miscellaneous general rules of thumb: **The order of moves is frequently important;** so try the moves in different orders. **Capture first with the unit of lowest-value,** unless another order is clearly better. **It frequently ends poorly if your opponent makes the last capture.**

## **EXCHANGES**

In his book, *The System*, Hans Berliner said, “**A completely equal exchange of material practically never takes place.**” Even an “equal” exchange usually favors one side or the other. Moreover, often, searching for or evading exchanges can be the main theme of the game.

Knowing what to exchange, and when, is important in chess. Equally important is the knowledge of which pieces not to exchange.

The exchange of centralized or dominant pieces is usually a crucial moment in the game. **When the piece goes, not only does its imposing prominence go, but also all of the moves that it took to get the piece to this dominant position go with it.**

The game of chess is a series of exchanges of material and positional conditions. The idea is to gain more and more with each exchange until you win the game (by resignation or mate) because your accumulated advantage is so large.

You can employ the exchange in attack and defense. It can simplify a

position or it can be part of a complicated combination. It can be the mechanism for gaining or losing a material advantage or a positional advantage. It can be a way to get open lines for your pieces.

You should not allow the point count of material to influence your decision to exchange more than what the position calls for. For example, an advanced centralized knight can easily be worth more than a poorly placed rook.

**When:** Exchanging is usually advantageous when:

- A poorly placed or inactive piece is exchanged for a strong piece or one that is better posted.
- The exchange relieves a cramped position.
- Your pawn structure is better than your opponent's pawn structure.
- The exchange prevents the opponent from effectively defending weak squares.
- The exchange allows the exploitation of a material or positional advantage (or makes it more difficult for the opponent to do so).

**CAPTURES:** Here are some rules of thumb on capturing: **Capture, usually, with the lowest-value unit. When you have two forked pieces of equal value, wait for one of the pieces to move before capturing the remaining one. Wait for your opponent to try to break the pin before you capture a pinned piece. Wait for a pawn to promote before capturing, and then capture the promoted piece (rather than the pawn before promoting).**

**RULES:** **When you are ahead on pieces,** trade pieces (but not necessarily pawns). You normally do not want to trade pawns because some endings with just pieces are drawn; you will need the pawns to be able to promote to ensure the win. So, be sure not to trade pawns if you might possibly run short of mating material. On the other hand, if there are so many pawns on the board

that your opponent might be able to lock up the position, then you should trade some pawns for the sake of mobility.

You need open files and diagonals for your pieces. The reason for trading pieces is that **the more pieces that are traded the more the balance of power** (the ratio of material count as well as the ratio of number of units) **shifts in your favor**. For example, three pieces vs. two is better for the stronger side than five to four, or a five to three material count is better than 15 to 13. Equal exchanges usually favor the stronger side.

The only good compensation for a material deficit is a counterattack. So, if you are ahead in pieces, exchanging pieces is good because it limits your opponent's chances of counterattack. Still another reason to exchange pieces is that, if you can get to a position with nothing but pawns (no pieces); it is good for you because they are the easiest kinds of advantageous positions to convert to a win.

Modern thinking is that the rule (when you are ahead in pieces, trade pieces, but not necessarily pawns) is not as absolute as once thought. Nowadays, the rule leans more toward, **if you have the advantage, exchange pieces only if the exchange brings concrete benefits**. The reasoning is that by having more material on the board, you are able to maintain the pressure longer, which should improve your chances of converting a small advantage into a winning one. In addition, the threat to exchange an opponent's piece can lead to other advantages.

**When behind in pieces**, trade pawns, but not pieces (especially if you are behind a knight or a bishop since your opponent cannot checkmate you with just a knight or bishop). If you have a material disadvantage, the more pawns you are able to exchange the better. The reason is that the fewer pawns on the board, the better your chances are to transpose into, or sacrifice (a piece for a pawn) into, a possibly drawn endgame. For example, king + bishop or knight (even king + two knights) is drawn whereas king + pawn could be won. A

related and similar axiom is if **you are winning, exchange pieces, if you are losing, exchange pawns.**

In the endgame, each piece has more power relative to the remaining pieces, so **exchanges are more significant in the endgame than during the middlegame.** Even equal exchanges in the endgame improve your relative material advantage. As a result, exchanges in the endgame are usually much more critical than earlier. If you are well ahead in material, consider sacrificing a little in order to increase your relative advantage. For example, if you have a queen and a rook vs. a rook (fourteen to five material count), sacrificing the queen for the rook improves your relative material count (now five to zero). As said before, it is also always good to have a few pawns as a backup.

Exchanging the queen is significant. It is not normally a neutral event; somebody usually comes out ahead. The exchange of queens can stop a kingside attack, and it accentuates the importance of the remaining pieces. It is also possible that you will want to exchange queens if your opponent has weak and exposed pawns. The queen might be his only chance of defending those pawns or to generating some counterplay. If you want to keep the position complicated, though (maybe because you feel stronger than your opponent, and you hope he will go astray in complications), then try not to trade queens.

**If you are the exchange ahead, it is usually wise to trade one of your rooks for the opponent's remaining rook. That makes it easier for your remaining rook to penetrate into enemy territory.**

**The side with the most freedom of movement, superior central control, or space, should avoid exchanging pieces** unless they create a concrete advantage by doing so.

**MATERIAL CONSIDERATIONS:** If you have a queen + two minor pieces vs. a queen + rook, you should avoid exchanging queens. If the queens are gone, the minor pieces decrease in value (almost a pawn's worth).

If you have two rooks, and your opponent has a rook and a minor piece (or

a rook and two minor pieces), you should **exchange your redundant rook for your opponent's only rook**. The rook's moves are different from the minor pieces' moves. By exchanging off the redundant rook, you would then be the only one left with the rook's unique abilities. Additionally, by trading a pair of rooks your remaining rook can infiltrate the enemy lines more easily.

If you only have one rook, though, plus a minor piece (or a rook and two minor pieces) vs. two rooks (plus other material on both sides) you would normally want to keep your rook. In other words, try not to trade rooks (because that would allow your opponent to get rid of one of his redundant rooks). The exchange is usually better for the side with the two rooks.

It is most often better to win a pawn outright than to win a rook for a minor piece plus a pawn. It is better to win a piece outright than to win a queen for two pieces.

Exchange with the piece of least value unless there is a reason not to. Answer all threats by improving the position. Correct exchanges are every bit as important as correct sacrifices. If you are behind in material, exchanging might not be the best idea.

**STRUCTURAL CONSIDERATIONS:** If you have a better pawn structure than your opponent does, it can be a good idea to exchange pieces (particularly the major pieces). The reason is that your superior pawn structure should give you better endgame prospects.

**SIMPLIFICATION:** Simplifying, without any particular reason, usually leads to strategically poor positions. Still, when the position calls for it, simplifying can be beneficial. For example, **before taking advantage of a pin, simplifying the position by way of a few exchanges can heighten the power of the pin**. With less material on the board, your opponent will find it harder to create counterplay.

If you are far ahead in material, simplifying by exchanging is usually the right plan. In this case, you can sometimes even exchange material of higher

values for ones of lesser value. For example, if you are far enough ahead on material you might be able to exchange your queen for your opponent's rook, or two pieces for one.

**THREAT TO EXCHANGE:** There are times when it is to the opponent's disadvantage to exchange. If the opponent cannot afford to exchange, the threat to exchange can be a powerful weapon that can lead to more control of important squares. For example, if you are able to advance a piece to an advantageous location when your opponent cannot afford to exchange, he might have to exchange or retreat. Either way, you will have made progress.

### **POSITIONAL EXCHANGE:**

Importance: **Every exchange changes the nature of the position in some way. This, in turn, can call for a reevaluation of the entire overall strategy of the game.** This is especially true in cases such as the exchange of good vs. bad bishops, bishop for knight, and the exchange of rooks or queens. The exchange of queens has an even larger impact on strategy since it generally marks the transition into the endgame.

Incorrect exchanges are among the main reasons for losing. Sometimes, incorrect exchanges happen because of an erroneous evaluation of the position and the consequent choosing of an incorrect plan; even more often, it is because of playing without the energy that is required by the plan. This often stems from a player making a series of mechanical exchanges in order to take the life out of a position with the idea of simplifying into a draw. This kind of a plan, though, is usually defective. Each exchange modifies the position and needs to be seriously considered.

**Every positional factor can be manipulated by exchanging.** For example, an open file can be closed, doubled rooks can be reduced to one or none, the bishop pair can be broken up, or a passed pawn can be exchanged.

When: Exchanges are advantageous if:



- An inactive piece is exchanged for an active one.
- It prevents the opponent from defending a weak point in his position.
- It makes it easier to transform a material or positional advantage into a win.
- It makes it more difficult for your opponent to transform a material or positional advantage into a win.
- It reduces the impact of your opponent's space advantage.
- It neutralizes your opponent's tactical possibilities.
- It makes defense easier.

*Bad for good:* **Trade your bad minor pieces for your opponent's good ones.** Exchange your opponent's active pieces and leave him with only inactive ones. Then, fight against the inactive ones. **Exchange your opponent's most active piece** (it is usually worth spending some time to accomplish this or to prevent its exchange if it is your piece). Exchange your opponent's pieces if they are working better than yours are or are better placed. **If one of your opponent's pieces is bad, exchange the rest of them** (leaving him with only the poorly placed piece). If your opponent has a poorly positioned minor piece, then trading the other minor pieces makes this disadvantage even worse. Exchange your weakest pieces, but be sure to keep the ones that are better (or will be better) than your opponent's.

*Squares and lines:* Trading off pieces or pawns in order to open files or diagonals can be an effective maneuver. Exchanging defenders of weak or important squares can be an effective way to gain control of them.

*Principle of the superfluous piece:* If you have a strong square that two of your pieces can advantageously occupy, you should exchange away the superfluous piece. Dvoretsky called this the "principle of the superfluous piece."

**TEMPO:** If you exchange, for example, an opponent's piece that has moved four times with one that has only moved twice, you have gained two tempi. As Nimzovich said, "Exchange with resulting gain of tempo" (My

System).

If you capture something and your opponent recaptures, it is your move again. Consequently, in complicated positions, it can be a good idea to take something. If you make a move, it is the opponent's turn to move. Instead, take the initiative; do not let him have it. Even if the exchange enables your opponent to recapture with a developing move in the opening, it still might be a good idea, since you had to lose a tempo anyway. "When one's position is undeveloped and somewhat inferior, it is better to exchange pieces than lose time in retreat" (Anthony Santasiere & Ken Smith, *The Romantic King's Gambit*).

Gaining a tempo off the king makes it possible for the attacker to move twice. If you gain a tempo off the king, look for potential tactics from the checking square.

**ENDGAME:** If a winning endgame is near, the general principle is to simplify by exchanging. Choose the pieces that you need to keep and exchange those that are not necessary.

**If you enter into an endgame a pawn up, you should exchange pieces.** If you only have one pawn, the opponent can sacrifice a piece for it and possibly draw. You want to keep and promote that pawn, and **promoting pawns becomes easier as enemy pieces are removed from the board.** Conversely, if you are on the defending side in an endgame with a material disadvantage, you should try to exchange pawns and avoid exchanging pieces.

Before you decide to exchange queens and head for an endgame, you should consider the changes that take place in the relative value of the pieces. The power of pawns and rooks grows, and, to a lesser extent, the bishop's power likewise increases. A sort of "net sum" of the power of all pieces is maintained, however, as the knight loses power. Even the queen decreases a bit in its relative strength. (Lev Alburt & Nikolai Krogius, *Just the Facts*)

**STRATEGIC CONSIDERATIONS:** Before initiating an exchange, consider what the position will be like after the exchange. **The pieces that remain on the board are what matters, not what was removed.** Re-evaluate your strategy after exchanges. **A re-evaluation of the game is necessary after every exchange, especially a trade of non-identical pieces or queens.** If you cannot afford to exchange queens, when offered, then most likely you cannot win.

**If you cannot win an important square by way of exchanging, do not exchange on that square at all.** For example, when a knight has a good outpost and another knight backs it up, the second knight is redundant. Exchanging, then, not only does not gain the post, but it eliminates a redundant piece for your opponent. The same concept can apply to other pieces tied to the defense of an important square.

## ***TRAPS/TRICKS/SWINDLES/GIMMICKS***

**TRAP, WHEN:** Normally, it is not a good idea to play for a trap at the expense of weakening your position. However, in a hopeless position, it can be practical to risk a trap that has a reasonable chance of success, even if it hastens your imminent defeat. In fact, if you are objectively lost, it is well worth looking hard for a hidden trap in the position. If there are lines with realistic chances that your opponent will overlook something, or that he will make an error (even if you see the refutation), you should go for it. Successful swindles usually happen because an overconfident (usually winning) victim has played carelessly or hastily.

Some traps can be based on good moves; those are the best kind. The worst kinds are those where a player weakens his position to try to force an avoidable trap on an opponent.

A good trap is based on the availability of an apparently good move that gives you an unexpected and strong reply if your opponent plays the move.

The trap is even better if it appears that you have overlooked something.

**TRICKS, WHEN:** Unless you are desperate, you should always play the best move. Do not just play a move for surprise effect or as a trick. Do not play for tricks when your opponent can avoid them and leave you in a bad or worse position. On the other hand, if you are losing anyway, trying a disguised swindle by complicating the position as much as possible (since mistakes are more likely under these conditions) or by setting a trap is a worthwhile idea. Gimmicks can be found in simple, harmless positions. They can be worth looking for in a desperate situation. **Swindles can only occur in bad positions**, so you first have to realize that your position is almost hopeless.

**TRICKS, HOW:** A good swindle should not only have an optimistic goal, but it should have a reserve goal as well. If the main objective is not met, at least the swindle should make life tougher for your opponent. You do not want to be left in an inferior position because of it. You want to give the intended victim of your swindle a lot to think about. The more options you give the opponent the more likely he is to fall for it.

Do not be afraid of losing. The swindle is a desperate act in an inferior position. You are giving your opponent a chance to go wrong. Give him the maximum chance to fall into the trap. He is most likely to go wrong if you have the initiative and you have put him under a lot of pressure. You can gain time on the clock this way, as well, since you are only looking for unclear moves, while your opponent will have to spend a lot of time trying to analyze everything.

Remember to use psychology, too, when setting a trap. Try to look normal, or even beaten. Try not to arouse suspicion that something is in the air.

# CALCULATION

*Knowing when to calculate is just as important as knowing how to calculate.*

**—Andrew Soltis, *The Wisest Things Ever Said About Chess***

There are a few terms in chess that are often confused with each other or even commonly misused. For example, the terms “calculation” and “analysis” are frequently used interchangeably. Here the term “calculation” is intended to stand for the move-by-move (“if he goes here, I’ll go there”) working out of a sequence of moves and the various replies to those moves (the variations). In contrast, “analysis” will mean the detailed examination and study of those resulting positions, and the application of principles and reasoning to them. In other words, “calculation” represents the process of mentally delineating a series of moves (and the possible responses to those moves). At the end of each series, an “analysis” is performed. Then, based on that analysis, an “evaluation” is made in order to decide which move to make (“analysis,” and “evaluation” are another pair of terms that are often confused as well).

## ***WHEN TO CALCULATE***

If perfect calculation was possible, you could play the game by using calculation alone. The saying that chess is 99% tactics is only true (if it is true) because tactics are just a human shortcut (a heuristic, a substitution) for brute calculation. If we could calculate perfectly, tactics, experience, strategy, memory, intuition and general principles would all be unnecessary. Of course, playing the game would be, too!

Even if a computer were able to play what seemed to humans to be perfect chess, the only way you could verify its perfection would be to have another computer calculate all of the possible variations to the end. That will probably

never be possible. The magnitude of the task is enormous (we cannot even comprehend those kinds of numbers). Since the task is so difficult that computers will probably never be able to play perfect chess, humans obviously cannot even come close to it. We are severely limited. That is why we have tactics, positional concepts, experience, and general principles to give us a little help.

To the extent that our concrete calculations are correct though, we get the most accurate moves in our search for the best lines. There are positions where general principles are not enough to handle the situation and calculation becomes necessary. **Principles are general and calculation is specific.**

It is possible to play well with general principles alone (without calculation) if:

- The position is simple.
- The difference between the candidate moves is minimal.
- The goals and strategies are obvious.
- The move is forced.
- The position is calm (non-tactical).
- There are almost no variations to consider.

In these cases, you should not waste much time trying to decide on a move. You can play by general principles, logic and intuition. On the other hand, **at critical points, or when the position is complicated, you should use the time to calculate.** Base every move in a chess game on either principles and logic, or strict calculation.

Knowing how to calculate in crucial situations is often more important than having a superior position. **Knowing how to calculate is one of the most important aspects in chess.**

There is a view held by some grandmasters that the game is all about

calculation, that general principles are almost useless. This view holds that the only way to play correctly is by calculating concrete variations in all positions. Whether this extreme viewpoint is accurate, or not, it is certainly clear that calculation is a major factor.

**SHARP POSITIONS:** You should calculate in sharp positions (when there is a lot going on tactically) and in open positions. Calculation is essential in critical, tactical situations. In these situations, playing on general principles alone is probably a bad idea. Your calculations should also be precise in these situations.

**OTHER TIMES TO CALCULATE:** In most positions, you do not need to calculate. Moreover, if you do not need to calculate, you probably should not. Further, you should not start calculating until you first understand the positional and strategic aspects of the position.

When to calculate, and to what depth, are decisions that require intuition (which, in turn, requires experience). Nevertheless, here are some situations when you usually need to calculate:

- when there is a choice
- when deciding on a decisive variation
- when converting an advantage into a win
- when the move you originally wanted to play no longer looks good
- when you suspect that a move forces a win, draw or a loss
- when your opponent has a better chance of improving his position than you do
- when deciding whether to enter an unclear pawn endgame
- when we find an appealing variation
- to justify a move that looks good positionally

**ONLY WHEN NECESSARY:** Calculation is time-consuming and exhausting. During the game, we should try to conserve time and energy. **Masters try to**

avoid wasting time calculating. Instead, they usually rely on general principles whenever possible. We should only calculate when it is **essential**. You need to be able to spot the critical positions, the ones in which you need to calculate. If a line looks interesting, but complicated, we should usually avoid calculating it.

## ***HOW TO CALCULATE***

**The outcome of the game depends mostly on your ability to calculate.** The calculation of variations is the main factor of the game. Calculation frequently causes players to change their original strategies. **Modern chess is becoming more and more concrete in nature and, as a result, calculation is becoming even more predominant. General principles still serve as a guide, but calculation is the dominant factor.**

Strong players do not need to calculate as often as weaker players do because they see a few good moves almost instantly and just pick one, often without even looking at the variations. Some say the calculations happen in their heads automatically without them even being aware of it. For the rest of us, good calculation is usually more difficult. Yet, with a little work, you can develop your calculating skills.

We have to remember that we are not computers. We cannot calculate billions of moves per minute. **We have to learn to be efficient and only to calculate what is important.**

**Calculation is a skill that can be improved with practice.** A tip: It helps to think as systematically as possible. At each move, first consider what options you have—**select two or a maximum three—and examine these “candidate” moves one by one before deciding.** (Daniel King, *Check and Mate*, DVD)



**BEFORE CALCULATING:** You should imagine some ideal target positions. Do not worry right away whether you can achieve them. Before you can calculate proficiently, you need to be able to visualize the position a few moves ahead. You need this ability in order to evaluate the resulting positions correctly.

**By first identifying concepts and ideal squares for the pieces in a given position we can bring this to the forefront of our mind.** Then when we finally calculate we will do so with an unexpected level of accuracy and speed. (Jacob Aagaard, *Excelling at Positional Chess*)

You must not expect your opponent to play inferior moves or fall into superficial traps. In your calculations, expect your opponent to find the best moves. This means you have to be alert to possible ideas, tricks and resources for your opponent.

**STEPS:** Think methodically. When it is your move, study the position. Identify the tactical and positional characteristics of the position. **Establish a goal of the calculation** (for example, mate, positional gain, material gain, perpetual check). This should give you some ideas. Use your intuition and imagination.

Consider the options carefully and then pick two or three candidate moves. **Finding the right candidate move is extremely important (do not fall short on this step).** Take a superficial look at these moves and their possibilities before calculating. Arrange these candidates in order of preference, their chances of most likely leading to your goal, or their apparent strength. Then, calculate the first line as deeply as you can and make an assessment. If you run into a problem during the line, try the next candidate. Make an assessment at the end of each line and choose the move with the best assessment.

**PRELIMINARY ANALYSIS:** It is a mistake to start calculating without first

making a preliminary analysis (a careful study) of the original position. This supplies the indispensable associations on which you can base your calculations. With a framework with which to guide you, your calculations will become faster and more accurate.

**FORCING:** One of the main keys to good calculation is to analyze the most forcing moves first. The reason is that, when they work, they are the strongest and most efficient moves that you can play. With forcing moves, you should analyze the most serious threat first. Analyze it to the end. If it turns out to be a good move for you, there is no need to analyze the other candidates (if you are sure they cannot be as good or better). If it ends up not being an excellent move, stop, evaluate the position, and go on to assessing the other continuations. Analyze all of the forcing lines to quiescence (the point where they are no longer forcing).

Calculation, of course, is still possible with non-forcing lines. In those cases, we consider the most likely moves of our opponent based on the spirit of the position.

**ONE LINE:** You should generally continue along one line when analyzing. Do not skip from one line to another. Though, if you do see a good idea along the way, do not hesitate to check it out. In complicated positions, candidate moves sometimes appear as you calculate other lines. If a general trend develops before you finish calculating all the variations, and that trend is unclear, you can set aside the line temporarily and come back to it after checking other lines (with the idea of finding a line that is clearer).

**ACCURACY:** Do not rush. Rushing a calculation can cause mistakes. Accuracy is crucial. There is no point in calculating five or ten moves deep if you make a mistake on the second or third move.

When you have assessed the variations and picked a move, it always pays to check the line one more time, slowly. Look for unexpected variations.

You can improve your accuracy by mentally placing diagrams in your

mind's eye of certain positions as you calculate (as the books do, only in your head), so that you can come back to these diagrams as you calculate variations from the diagram. In order to do this you have to choose a point of departure (for example, when the pawn structure changes) and pause to imprint the image of the position clearly into your memory before continuing with the branches.

**QUIESCENCE + ONE:** Carry out calculations until a forcing line reaches a quiet position (no matter how many moves that takes), or as many moves as it takes a non-forcing line to reach a conclusion. Then, to help ensure a sound analysis, you should check at least one more move beyond (to avoid a surprise).

**Evaluation:** Calculations are meaningless if the evaluations at the end of each line are inaccurate. This ability is crucial to strong play. It does you no good to be able to calculate deeply if you do not know how to assess the position after you reach it in your mind. **Train yourself to finish calculating one line and evaluate it before going on to the next line. Additionally, finish each line with a specific conclusion.**

**WIDE NOT DEEP:** Before you go deep into the various lines, think about the candidates and the first few moves. Look for alternatives for both you and your opponent early in the calculations. **What you miss early in the calculation is usually the most important.** Do not even try to go too deep at this point. **The deeper you go, the greater the chance for error. "Calculate wide, not deep.** The point is whatever happens in the long run is not important, if you drop something here and now" (Jacob Aagaard, *Excelling at Chess Calculation*).

## ***CALCULATION ERRORS***

**COMPLICATED POSITIONS:** It is easy to make calculation mistakes in complicated positions. Missing one little move can have a huge affect on the

analysis. So, **do not analyze complicated tactics when you can avoid it.** There are many positions where calculation is necessary (such as in sharp positions), but even then you should calculate variations no more than is necessary. **When it is possible to make a decision based on positional grounds, you should.** The quiet way keeps the advantage without fears. It is also a timesaving device. The trick is to know what you can and cannot calculate. Do not calculate extremely complicated lines for a long time. In these cases, rely on your intuition. Do not strive for perfection; it is unachievable.

Another kind of mistake in calculations is to calculate a few lines and then, being dissatisfied with the results, to play a move with little or no analysis behind it. Another calculation error is to be so focused on the calculations alone, that you forget about the need for a good assessment of, not only the current position, but also the end of each variation.

**LENGTHY VARIATIONS:** If you try to get perfectly assured in an unclear or difficult position, you are likely to get involved in a lengthy calculation. After you have devoted a long time to calculating a complicated line, it is hard to dismiss the move as being inferior. Often, we talk ourselves into playing the move anyway, thinking that our opponent will not find the refutation. Of course, they usually do. The opposite can happen too: you can become so frustrated looking for the perfect solution that you overlook a good, or even great, move.

Most often, errors in lengthy calculation occur near the beginning (even the first one or two moves) of the calculation rather than towards the end. These early oversights are usually more important, too. Even minor improvements are more often found near the beginning of the calculations rather than deeper into them.

**TOO MANY VARIATIONS:** If you look at too many variations, you will waste time and energy and have a greater possibility of errors. As with lengthy variations, sometimes, if you look at too many variations, you find an attractive

looking move and spend a lot of time trying to justify it. Even if it proves to be inferior, the amount of the analysis devoted to it can cause you to forget that it was inferior, and it is played anyway.

If the position is not sharp and when there are not any forced lines, only a few lines should be looked at. You should keep these calculations short as well.

**TOO FEW VARIATIONS:** It can also happen, of course, that too few variations are looked at (possibly because of excessive trimming of the candidate moves). Then, you are likely to miss a good move. One cause for this excessive trimming is failing to look outside of the box (in other words, not looking at unusual, antipositional or bizarre moves).

Sometimes, with only a few pieces on the board, you cannot find a good move. In those cases, it can pay to look at many, if not all, of the possible moves.

**ZWISCHENZUG:** One of the most common calculation errors is to **overlook a Zwischenzug** (an unexpected intermediate move, or in-between move). One of the ways this can happen is when we are so focused on our own plans that we do not fully appreciate the possibility of the opponent having a hidden resource. Zwischenzugs are often based on simple ideas. For example, when a piece is attacked, it does not necessarily have to move right away; there might be another move, such as a check or an attack on another piece, that you can play in-between the moves.

## ***DOUBLE-CHECKING/ SAFETY CHECK***

After the calculating is done (particularly after lengthy or complex lines) and you have decided on the move to play, before playing it you should go through the variation one more time. Go through it slowly, and assess once more the final position in all of the variations to ascertain that the chosen position is the correct one. In other words, **double-check your findings before playing the move.**

**If you plan a move that is committal and you do not have a safety net, then you cannot afford to be wrong.** This is another case where double-checking is valuable. **If a move looks like it is winning, then you need to check it out thoroughly.**

When you double-check, **ask yourself if there are any pieces or pawns hanging, any mates looming, or any other oversights.** A safety check is also done when looking at candidate moves. If you see that the move loses material or is subject to double attack, eliminate it from the list of candidates.

## **CANDIDATE MOVES**

**FINDING CANDIDATES:** “The move is there, but you must see it” (Tartakower). You have to find candidate moves for each move of a variation, not only for you, but also for your opponent. Look briefly for sacrifices, bizarre and unexpected moves. Do not summarily dismiss odd-looking moves or even impossible moves. Sometimes, they are not only good, but they are often overlooked by your opponent. If you know a piece would be good on a certain square, consider (at least briefly) how to get it there.

Ask yourself what weakness or opportunity was presented with your opponent’s last move, especially if it was a surprising or unnatural looking move. What does his move do? How does it affect his position and yours? What possibilities does he have now? What possibilities do you have now? Is he threatening anything? These are a few ways to get some ideas. “The most common error that inexperienced players make about their opponent’s last move is failing to appreciate its strengths. But the most common error that *experienced* players make is failing to appreciate its weaknesses (Andrew Soltis, *How to Choose a Chess Move*).”

You have to break the position down into the tactical and positional elements in order to be able to find plausible moves. Look for weaknesses on both your side and your opponent’s, and look at the positional features (such as

open files and outposts). If you see a weakness, work out how to exploit it. Note the imbalances in the position (such as knights vs. bishops and space). Are there any tactical shots (for example, a loose piece or a possible fork)? Look at ways to attack your opponent's pieces.

Looking still deeper into the position can generate ideas, uncover combinations and suggest plans. **If you do not find a strong move, do not forget to consider a move that improves the position of a piece or improves its activity.** Look at moves that diminish the opponent's position or his activity. Consider moves that trade off your opponent's good pieces or your bad ones.

After the position has been examined, you can make conclusions about the path to your goal. You can find candidate moves by considering the situation in light of your existing strategy and the demands of the position. You can also find candidates during calculations of other candidate moves. Sometimes, you will notice a tactic or positional idea while calculating a line. As well as, after calculating a few lines, and considering the results of those lines, a recurring theme might suggest a new candidate move.

Trying different move orders of a combination is another way to find candidate moves. Still another way to find ideas or candidate moves is to ask yourself what two moves you would make if you were allowed to make two consecutive moves.

The depth of calculation is not as important as the breadth of the variations. More is better than deep. **There are usually only a few good moves in a given position, so do not discard a possible candidate too quickly.** If the strong move is not found and the move does not become a candidate, you will not ever calculate it. In which case, all of your efforts could be wasted.

You should look at almost every possible move as a potential candidate (and if you find a good one, keep looking for a better one), but keep the number

of candidates actually chosen for calculation to a minimum. You want to calculate only the relevant candidates. “It is bad to examine an excessively large number of variations, but it is even worse not to examine all the necessary moves” (Alexander Kotov, *Think Like a Grandmaster*).

**PRELIMINARY CALCULATION:** If you are in a critical position, and you have the time, you should take a brief look (a few moves deep) at all of the possible moves on the board. In a normal position, if you have a large number of candidates, do a quick calculation (of two or three moves deep) on each of them, to rid the list of obviously inferior moves. A superficial quick check of the lines can save time by cutting your list of candidates to a more workable size. You might even find a move that is so obviously strong that you do not need to look at any others. The bulk of the time is spent calculating the lines. Finding the candidates is relatively quick.

While you are doing this quick check, keep a mental list of the preliminary rankings of the remaining candidates. This approach will give you some structure when you start prioritize the order of lines to calculate.

Before you start to calculate a selected candidate, think about what will happen if you make the move. If it allows any checks, captures or threats that you cannot counter, discard it.

**ORDER TO CALCULATE:** Once you have chosen some candidates moves, try to make a mental list of the order in which you plan to look at them. Do not make the common mistake of analyzing the first move that comes to mind. If you did, you could be wasting your time or, worse yet, missing the best move by trying to convince yourself that this (first to mind) move is the best move. Sort the candidates in order of sharpness and preliminary appeal. Then, when you start to calculate, **start with the moves that are most likely to succeed and the sharpest moves**, then methodically eliminate them before calculating the tamer positional candidates. **If you have an attacking position, consider your candidates in order of aggression with the most aggressive move**



**first.**

There is still something to be said for first considering our initial instincts, though. By starting with our first impulse, we are taking advantage of the potent value of our intuition.

I would even go so far as to suggest that the creation of candidate lists is never the primary task. **By leaning towards an instinctive choice first, we activate our intuition (and experience), engage the practical aspect of play by preparing to make a decision, and initiate an examination of the abstract factors of a position.** All of which in turn guide our concrete analysis and begins the process of sorting likely candidate moves. This is likely to be even more relevant in positions of a purely tactical nature. (Jonathan Tisdall, *Improve Your Chess*)

Tisdall goes on to say, though, that there are times to make a conscious list of candidate moves; such as when there is a abundance of choices, when your initial calculations do not yield the desired result, and, especially, in sharp tactical positions.

**FORCING LINES: The forcing moves (moves that essentially force an opponent's reply) are often the most promising. Look at them first (especially any forcing move that draws out the enemy king).** Calculate the most forcing move first. It is sometimes even okay to look at just this one line, as long as it is forcing and strong or winning. Though, most of the time, you need to look at several lines.

Calculate all checks, captures and threats for both sides, or, as C.J.S. Purdy would say, "all the moves that smite!" **Calculate the moves that are forcing and tactical (including sacrifices) first** (especially when one side is winning) and then, only if a clear win is not found, calculate the quieter, strategic, or more positional lines. The more forcing lines are easier to calculate because the opponent does not have as many alternatives and, therefore, he has less chance

of finding a saving move or a counterattack. If a line is not completely forcing all the way through, look at the forcing moves first, then go back and look for the possible deviations.

**COMPLEX POSITIONS:** In complex positions, difficult situations, critical positions, or highly tactical positions, it is essential to look at all relevant possible moves and to recheck your calculations. In complex positions, it is often hard to find the candidate moves until you start calculating some lines. Then, ideas will come to you from the calculations themselves. A nuance or fine point will sometimes suggest another line.

**COMPLEX LINES:** If, when you are calculating a line of one of your candidates, you come to a complex or volatile position, you should temporarily discontinue that line and look at another candidate. That way, you might find a more clear and simple line of a stronger move. If so, the savings in time and energy will be worth it. If not, you can always return to the difficult line; this time, focusing all of your attention on it. If the line is too complex, sometimes it is best to make an assessment based on a quick consideration of the variations.

**DEPTH OF CALCULATION:** In a tactical position, calculate each candidate to quiescence (a quiet position). This is a position where there are no checks, captures or threats. Then, find some candidates at the end of the sequence and do one more move for good measure. Compare the results with the other candidates. If you find a good move, do not keep analyzing it just to verify how good it is.

Keep in mind, **the deeper you try to go in your calculations, the more apt you are to make errors.** It gets harder and harder to keep a clear image of the positions in your mind. In addition, if you spend a lot of time looking at one variation, you might even forget about your other choices earlier on. **The depth of the lines is not as important as how many lines you look at.**

Contemplating long variations is also tiring. This tiring effect can

adversely affect not only the lines you are calculating, but also your subsequent play. For the same reason, you should break off your analysis when you see that a line is going nowhere.

**BEST MOVE: If in doubt, play the most principled move or the clearest variation that gives an advantage.** Do not make the mistake of calculating a few lines and then, after not finding anything you like, playing a line that you have not even analyzed at all. This is a common mistake.

If you see a move that gives you the advantage, do not hurry to play it; consider some other candidates too. We have a tendency to play the first move that seems good to us because we subconsciously try to justify our intuition. This good-looking first move is not always the best move. If we do not look for other moves, we are not likely to find the best one.

If, after adequate calculation, your candidate move does not lead to clarity or to desired results, go back and look for another candidate move. You do not want to be bogged down with variations. There might be a simpler or a better move that you have yet

## ***TREES/VARIATIONS***

**KOTOV:** Kotov taught us that we should calculate each branch of the tree of analysis only once: “In analyzing complicated variations one must examine each branch of the tree once and once only” (Alexander Kotov, *Think Like a Grandmaster*). This is idealistic and often impractical. Przewoznik & Soszynski state what seems to be the prevalent attitude of chess teachers and strong players these days:

Chess players, including the very best, do not as a rule immediately make a short and neat mental list of candidate moves that they then consider one at a time, just the once. This is simply not how people approach most problems, nor is there any reason why they should approach all problems

that way. It is just one solving method among many. (Jan Przewoznik & Marek Soszynski, *How to Think in Chess*)

You need to recheck lines occasionally, especially in critical positions. Likewise, you should always recheck the chosen move before playing it (which might even lead to abandoning the line and going over the next best line a second time). Nevertheless, it is generally a good goal to try to calculate lines as few times as possible. It is bad to be jumping back and forth from one variation to another in your calculations.

Rigidly using the Kotov technique would suppress creativity. It would also prevent you from learning something from a variation that could improve a line that you have already calculated. If you do find a good idea in a line that you have already checked, it is better to ignore Kotov's advice and re-calculate the line.

**POTENTIAL ERRORS:** Analyze a move completely. Look at all of the replies. Be careful in your calculations not to confuse similar variations. Look at the final position; **if there are still valuable moves for your opponent at the end of the calculation, you need to keep calculating. Make a final evaluation at the end of each line before looking at the next candidate move** (otherwise, you will have to waste time calculating it again later).

**TECHNIQUES:** If you notice a good-looking tactical shot, look at your opponent's weakest replies first. That way, after eliminating the easy ones, you pare the lines down to a manageable few. Then, you can focus on the few remaining lines. On the other hand, if you are pessimistic about the line, look at your opponent's best defense first. If it works, there is no need to continue looking at the line. If you have many lines to look at, you can simplify your process by looking at the short lines first, or the lines that should result in clear evaluations.

When there are few forcing lines, it will be harder to calculate deeply. In these kinds of lines, evaluation becomes more important. During the

calculation, if you come to a position where there are several moves to choose from, make a clear mental picture of the position and try to return to this point in your calculations (rather than going all the way back to the beginning each time). **If you have a choice between two equal moves, choose the one that has the fewer variations** to consider. That way, there is less chance of a mistake.

# SACRIFICES

*It's always better to sacrifice your opponent's men.*

—Tartakower

## **WHEN TO SACRIFICE**

**OLD SCHOOL:** Tarrasch believed that, if you made the strongest moves, the need to sacrifice would seldom arise. Euwe argued that, even when open lines and pieces are available, it is not sensible to sacrifice on general principles; you should calculate all of the variations first. Likewise, Capablanca said that you should not sacrifice anything if you are playing to win. The current attitude about sacrificing is, in general, not as strict. These days, sacrificing is an accepted way to make progress in many positions.

**OPPONENT:** There are times when sacrifices can be effective against certain types of players. **Sacrificing might work particularly well against a quiet player** and not so well against the player who likes complications. Sacrifices can also be uncomfortable for an opponent who is defending, especially one who is also in time-trouble.

**POSITIONAL:** Sacrifices are often made possible by mistakes on your opponent's part. If you have a clear positional advantage, more control of the board, or weaknesses exist in your opponent's position, a sacrifice might be in order. **Sacrifices of major pieces can only be possible if you are far ahead positionally.** If you are behind positionally, you probably cannot afford to give up the material, and a sacrifice will probably be unsound. An exception would be if your loss were looming anyway. Then, it might be worth a try.

The way to use your advantage in space, or to use your advantage in time, when you're ahead in development, is to sacrifice some material, open the

position, and then crush your opponent with your army that is well-mobilized and could attack before your opponent, your enemy, is mobilizing his forces to defend. (Garry Kasparov, *Mr. Kasparov, How to Play the Najdorf*, Vol.1, DVD)

**TIMING:** Mistakes that allow for a sacrifice do not necessarily have to be immediately followed by the sacrifice. Opportunities for sacrifices are usually short-lived, especially in tactical situations, and you must take them at the right time. Although, in games that are strategic, the opportunity might last a few moves.

When a player feels that he is losing a positional battle, he often senses that if he continues to play “normally” then the course of the game will inevitably lead to his defeat. In such situations, it is essential to sense the moment when the course of the struggle can be altered by sacrificing something, even though correct play from the opponent will all the same lead to one’s defeat. However, the opponent is very often unprepared for the change in the dynamics of the position and fails to react in the most appropriate way. (Alexander Beliavsky & Adrian Mikhalchishin, *Secrets of Chess Intuition*)

**IMMOBILE POSITION:** If you are ahead on material, but you have an immobile position, it can be the time for a sacrifice to open up the position. It does no good to have the extra material if you cannot use it. You can make a sacrifice to open lines, open the enemy king position, and to gain tempos for moves by other pieces.

**DEVELOPMENT:** If your opponent has violated the opening principles, chiefly those dealing with development, you could be justified in sacrificing material. **If you have a big lead in development or a superior position, look for a sacrifice.**

**QUEEN:** Opportunities for decisive queen sacrifices rarely present themselves in the opening. “A combination with a queen sacrifice, leading by force to a win, does not often occur at the start of the game. It normally follows as retribution for a blunder, or at least a very serious error” (Iakov Neishtadt, *Queen Sacrifices*)

**ATTACK:** If you have more pieces on hand for an attack against the opponent’s king than he has for defense of his king, then a sacrifice for an attack might be justified.

## ***HOW TO SACRIFICE***

**SOUNDNESS:** In most cases, if you think a sacrifice looks good a few moves deep, you do not have to calculate all the variations in advance. In fact, a true sacrifice cannot be calculated to the end (or it is not actually a sacrifice). **How dangerous a sacrifice proves to be over-the-board, especially at the class level, is more important than the technical soundness of it.** A speculative sacrifice that is refuted later by Rybka or Fritz might even win the real game over the board. “Every middlegame sacrifice and stratagem is not sound. And every refutation is not always found!” (John Collins, *Maxims of Chess*).

You have to have confidence in the position and you should know that the sacrifice is correct. It is not a question of whether you can get away with the sacrifice. It is a question of creativity with a dose of optimism based on fundamentals. It helps to have a safety net (such as a perpetual check) whenever you sacrifice. That way, if your attack fails, you have something to fall back on.

**When considering a mating sacrifice, look for the mating position you hope to achieve.** Determine what you need to do to achieve it. Usually, that means using the sacrifice for removing some of the defenders. As with calculating combinations, **look for the most forcing and aggressive moves**



**first.** If the sacrifice fails to deliver the mate you were seeking, but leaves you with an advantage anyway, it is sound.

**SACRIFICES TO KEEP KING IN CENTER:** If your opponent cannot connect his rooks by castling, he will have trouble coordinating his pieces and defending adequately. He will be at a severe disadvantage. Here are some general guidelines for a sound sacrifice aimed at keeping a king in the center: **The sacrifice should be sound if a pawn or the exchange is sacrificed and your opponent is unable to connect rooks for at least two moves, and one new weakness is created for your opponent.** To be sound, the sacrifice of a piece should gain the initiative, one pawn, and an uncontested outpost or control of a file plus two weaknesses. Usually, fair compensation for a rook sacrifice is two pawns, heavy king exposure, the initiative, control of a file or outpost, and good position for a piece.

**Time and space:** If you have an advantage in time or space and are ahead in development, you should sacrifice some material to open the position and attack with your active piece majority before your opponent can mobilize enough units to defend.

**CLEARANCE:** Sometimes, your own pieces or pawns can get in the way of the execution of your attack. In such cases, sometimes, you can sacrifice them to clear the way. “In the course of a game it often happens that the scope of activity of the attacking side is limited by its own pieces or pawns. In these situations, they can be cleared away by sacrifices” (Mikhail Tal, *Tal’s Winning Chess Combinations*).

**PATTERNS:** There are many standard sacrifice patterns (a few of them are discussed below). A good arsenal of these patterns can speed up the recognition and execution of many thematic sacrifices. Because they are usually played early in the game, **having a lead in development helps most typical sacrifices to succeed.** With a lead in development, you should have more pieces positioned for the attack than your opponent has for defense. **Be**

**sure to remember the whole pattern. Knowing only the first few moves can get you in trouble.**

**THE Bxf7+ SACRIFICE:** Probably the most common of all sacrifices is the Bxf7+ sacrifice. Usually, the sacrifice is followed up by the queen and a knight coming in for the kill. The queen takes the a2-g8 diagonal and the knight goes to g5. The sacrifice usually works best if the escape square is blocked by one of the opponent's own pieces. This helps to confine the target to a smaller zone. Then again, the escape squares are sometimes covered by additional attacking pieces. One typical result is a smothered mate. On the negative side, this sacrifice calls for the parting with one of your best attacking pieces, the white-squared bishop.

**THE Bxh7+ SACRIFICE (THE “GREEK GIFT” SACRIFICE):** Usually, there is a follow-up check from a knight at g5 followed by a queen to the h-file (usually h5) with mate to follow at h7. If mate is not there, it can be useful to have a bishop covering the c1-h6 diagonal and a rook that can go to the third rank and swing over to join in the attack.

**THE Nxf7 SACRIFICE:** Many lines of attack converge on the f7 and f8 squares: diagonals from the center, the f-file from the castled rook, and the short diagonals h6-f8 and h5-f7. For that reason, open files are central to the Nxf7 sacrifice. The sacrifice can be equally valuable whether the king is castled kingside or not yet castled. As with the Bxf7+ sacrifice, sometimes the defender's own pieces can hinder its defense by getting in the way of an escape.

The Nxf7 sacrifice is all about open lines, more so than any of the other standard sacrifices. Open files and diagonals tend to converge around the f7- and f8—squares. The defender may block off a line or two in one direction, but then danger suddenly comes from another. (David Lemoir, *Essential Chess Sacrifices*)

**THE DOUBLE BISHOP SACRIFICE:** The double bishop sacrifice usually needs at least a queen and a rook for support. The best position for the sacrifice is when the bishops are aimed at h7 and g7, the queen can go immediately to h5 and a rook lift is available to the third rank and on to h3. Ideally, the defender will have his kingside pawns on their original squares and will not have any pieces available with which to defend against queen checks (usually from g4, g5, or h5) or rook checks from h3.

The defender of your double bishop should not be able to decline the second bishop sacrifice easily, or you might end up a piece down. As with many of the other standard sacrifices, it helps the attacker if the defender has one of his own rooks on f8 to block off the king's escape.

**THE NG5 SACRIFICE:** Against a kingside-castled king when you have not castled, a knight (or a bishop) on g5 is often hit with h6. The Ng5 sacrifice comes about by playing h4 in this situation. If hxg5, the plan is to use the open h-file for your yet-to-be-castled, or opposite-side-castled, rook still on h1. The rook on the open file in conjunction with a queen landing on h5, can easily lead to mate or the flushing of the king out into the center where it can be attacked by other pieces.

**AFTER SACRIFICING:** Typically, after a sacrifice you should force matters, usually with checks. A relentless attack against the king is essential. Accurate play is necessary and even second-best moves are often not good enough. **Before sacrificing, you should have a clear follow-up in mind.** Be sure to have pieces, especially the queen, ready to join quickly in the attack (preferably all of your pieces should be ready). Be ready to sacrifice again. Many times, you need to remove more than one of the guarding pawns in order for the attack to succeed. Be careful not to become carried away with the idea of playing brilliantly and sacrifice more than you need to.

## **WHY SACRIFICE**

**ATTACK:** Sacrifices are often the crucial element in an attack (or counterattack). They can open lines, gain the initiative, remove defenders, increase piece mobility, expose and restrict the opponent's king, or throw the opponent onto the defense.

**RESTRICTING KING:** Sometimes, it can be worth a pawn, or even a piece, to keep the opponent's king trapped in the center or in a corner. When the king is immobilized, it is easier to generate an attack.

**DEVELOPMENT:** You can employ sacrifices in the opening and early middlegame for rapid development. A sacrifice can be like an investment. You are spending a resource with the idea of getting more in return. The value of a sacrifice for development depends on how large of an advantage in development is obtained and the existence of flaws that remain in the opponent's position.

**INITIATIVE:** Even if you have played a perfect game, a sacrifice is occasionally the best way to gain the initiative.

**COMPENSATION:** Sacrificing for some form of compensation can be warranted. The compensation can take many forms (such as the initiative, activity, control of the center, or pressure) and it can be hard to evaluate. Often, something concrete is sacrificed for something abstract. In the endgame, the compensation should not be as vague; there you need something more concrete in order to risk a sacrifice.

**POSITIONAL:** Sacrifices of material can realize positional gains. You can make a sacrifice to lure the opponent away from important squares.

**TEMPO:** Time is a key element of the game. The gain or loss of a single tempo can easily determine the outcome of a game. A sacrifice to gain time, whether for development or initiative, can be advantageous or even decisive. **It is often better to sacrifice when your pieces are well placed than to take the time to regroup them for some other plan.**

**PSYCHOLOGICAL:** One of the big advantages of a sacrifice is

psychological. **The shock of the sacrifice disrupts the demeanor of the defender, leaves him a little confused, and makes coherent thinking a little harder.** Errors and blunders following a sacrifice are common because, if he did not see the sacrifice coming, the victim often becomes afraid of ghosts.

The main advantage of a sacrifice is that it occurs suddenly and at least the opponent is usually caught by surprise. This is due mainly to the fact that we tend to think in terms of more or less fixed values of the pieces and to forget that such values are relative. In the heat of the battle, we often fail to bear in mind that the values of pieces are variable. (Yuri Averbakh, *Chess Tactics for Advanced Players*)

A sacrifice that your opponent cannot accept can leave him with feelings of helplessness or vulnerability. Such a player is a much easier target.

**HINDRANCE:** Restricting an opponent's pieces in certain situations can be rewarding. **Reducing the power of one of your opponent's pieces can give you enough of an advantage to win a game.** A sacrifice for that purpose can make it difficult for your opponent to maneuver or it can give you enough freedom to be able to finalize an attack. You can make a sacrifice to present an opponent with difficult problems, especially in time-pressure.

**DESPERATION:** In a passive, bad, or losing position, a sacrifice can be worthwhile as a means of changing the course of the game. This can be especially true in a losing position, as a last ditch effort to get something going, or even to force a draw.

**BEAUTY:** Sacrifices can be artistic as well as effective. Quite often, the beauty of a game of chess is determined by the sacrifices in it. The great tacticians wanted to win, but they were also captivated by the beauty of the sacrifice.

## ***ACCEPTING THE SACRIFICE***

*“A sacrifice can only be refuted by accepting it.”*

**NO VIOLATIONS:** If you are sure that you have made no violations in principle, you should accept the sacrifice of one of the four center pawns; otherwise, that pawn will likely become a problem for you.

**WHEN IN DOUBT:** If you do not understand the sacrifice, you doubt its soundness, or you cannot decide whether to accept the sacrifice; you should accept it. Similarly, if the sacrifice is unclear and you are in an uncomfortable situation, take it (the sacrifice might be a mistake). If not, at least you will learn something.

**AFTER ACCEPTING:** If you accept the sacrifice, do not play with the idea of maintaining a material advantage. Remember, your opponent got something in return for it. Keep in mind that returning the material at some point, when your opponent has made concessions trying to recover it, is often the best idea.

Accepting an offer of material, when no disastrous consequences are on the horizon, is usually a correct plan. As Alekhine pointed out, however, there is also a psychological danger when you have extra material. The game takes on a sharper character, and draws become less and less likely. (Eric Schiller, *Encyclopedia of Chess Wisdom*)

## ***FINDING SACRIFICES***

**LOOK:** Every sound sacrifice is made possible by a mistake on your opponent's part. For this reason, **when a move or a position has a defect to it, there might be a sacrifice available.** If you have the superior development, look for a sacrifice. If you can simultaneously attack two pieces, pawns or squares, a sacrifice might be at hand. Look for loose or under-protected pieces or pawns. **Any weakness in the opponent's camp is a**

**potential target for a sacrifice.** If you do not look for the potential sacrifices, you are unlikely to see them. You have to look.

**KING:** If you have pieces pointed at the opponent's king or near it, look for destructive sacrifices. At least you must look at all of the forcing lines coming out of a potential sacrifice. In addition, always fully calculate any sacrifice that draws your opponent's king out away from its shelter.

**SMALL GAINS:** Do not overlook sacrifices that gain small advantages. They can be valuable, too.

**KNIGHT FIRST RANK:** Whenever you push an opponent's knight back to its first rank, consider pushing a center pawn, even if it involves a piece sacrifice.

**ILLOGICAL:** When looking for a possible sacrifice, consider moves that lose material. See what pieces you can put en prise. See if you can find any good way to lose the material. Try to rise above your natural prejudices about pieces and positions. Players rarely sacrifice when the opponent has options (such as whether to accept or not, or a choice of ways of recapturing) because there is a prejudice that at least one of the opponent's choices must be good. Try not to be restricted by that kind of narrow-mindedness.

Another example is the queen. Queen sacrifices are often overlooked, by both sides, because of the prejudice of the value of the piece. We do not expect it because it is such an important piece. So, **when looking for sacrifices, consider the paradoxical, the odd, the illogical moves, as well as queen sacrifices.**

## ***PAWN SACRIFICES***

*Pawn sacrifices are in most cases more profound than piece sacrifices.*

**—Tarrasch**

**OPENING:** “A rule of thumb says that the gain of three tempi justifies

**a pawn sacrifice in the opening”** (Hannes Langrock, *The Modern Morra Gambit*). Although, be careful with the logic... **giving up three tempi in the opening to win** a pawn is usually not a good idea. There is a difference.

A pawn sacrifice in the opening can change the situation to the extent that favorable (and unfavorable) elements in the position are abruptly accentuated. However, do not sacrifice in the opening without a clearly good reason. Possible reasons might include:

- to prevent your opponent from castling (at least for many moves)
- to open a line in the center (usually for rooks or bishops)
- to take the opponent's queen out of play
- for a strong attack
- for a good lead in development
- for a lead in development plus some positional advantages

If you are sure you have not violated any principles, you should accept a pawn sacrifice of an important pawn (a center pawn or a BP). Since it is difficult to be certain that you have not violated any principles, though, you should verify any possible traps or tactics. **Even in the endgame, do not sacrifice central pawns without the utmost care.**

**INITIATIVE:** If you have sacrificed a pawn for the initiative, you have to play forcefully and precisely. You must be sure not to let your opponent get the initiative back from you. **It is a mistake, after sacrificing a pawn, to play to regain the material deficit.** Most attacking players would rather sacrifice a pawn for development and the initiative than to involve themselves in risky pawn-grabbing.

**PSYCHOLOGICAL:** We should not be afraid to play pawn sacrifices. Even if the idea behind the sacrifice fails to generate an advantage, it is difficult for your opponent to win just because of the extra pawn. Frequently, he will even let his guard down and play poorly due to over-confidence.



**When you sacrifice a pawn, do not play like you lost it.** Play as if it was sacrificed intentionally. If you are on the receiving end of a pawn sacrifice, be aware that **it is usually a psychologically good move to refuse the offer.**

**WHY:** Some of the many possible reasons to sacrifice a pawn are:

- to prevent the opponent from castling
- to gain the initiative
- to gain an edge in development
- to gain the bishop pair
- to cause tactical problems for your opponent
- to open lines
- to block lines for your opponent
- to make squares available for your pieces
- to weaken a color complex

“In preparing one of my earlier books on miniature chess games I noticed that **Garry Kasparov has made a career out of sacrificing pawns to get his rooks into play while those of his opponents are still slumbering**” (Neil McDonald, *Chess: The Art of Logical Thinking*).

## **EXCHANGE SACRIFICES**

**COMPENSATION:** Compensation for the sacrifice of the exchange can come in the form of: getting open lines, getting an attack, gaining the initiative, getting a strong center, or other positional and tactical forms of compensation. It can be adequate compensation if the opponent's rooks cannot get into the game rapidly after the sacrifice, while your pieces can start making threats. In addition, a strong blockade that limits the opponent's play can be good compensation.

Probably, full compensation for the sacrifice of the exchange rook for a

fianchettoed bishop would be gaining the bishop pair and the damage to the opponent's king shelter. Other compensation for the exchange rook for bishop could be gaining the bishop pair plus a protected passed pawn, or the bishop pair plus a weakened king position.

**WHEN:** Certain pawn structures are better suited for exchange sacrifices than others are. **When the structure favors the activity of bishops or knights over rooks, the sacrifice of the exchange might be beneficial.** Sometimes, exchange sacrifices are made because of how they affect the center (for example, exchange sacrifices on c3 in the Sicilian Defense). **During an attack, the sacrifice of the exchange can be called for.**

Rooks show their true strength in the endgame. Before then, they are about the same value as the other minor pieces (since so much of the value of a piece depends on the coordination between them and the other pieces). As a result, an exchange sacrifice in the opening or the middlegame is more likely to be beneficial.

Sometimes, the exchange sacrifice can be a desperado move. If the piece is lost anyway, at least some material is gained in return.

**WHY: Generally, the exchange is sacrificed in order to cause weaknesses or positional problems for your opponent.** The common exchange sacrifice on e6 (or e3) is typically made in order to weaken the opponent's pawn structure as part of an attack on the king. Some common reasons for an exchange sacrifice are:

- to get control of a color complex or important squares
- to upset the coordination between your opponent's pieces
- to make use of an advantage in development
- to defend against an attack
- to gain the initiative
- to demolish the opponent's pawn structure
- to obtain a strong pawn center

- to open lines for an attack

The exchange sacrifice can also be a strategic factor in modern dynamic chess. The idea could be to get an unusual position with adequate compensation from piece activity (plus maybe a pawn or two). **Sacrificing the exchange and sacrificing pawns are two of the most common ways to seize the initiative.**

The exchange for a pawn can often be drawish in quiet positions. However, the winning plan is usually to give the exchange back at some point to remain a clear pawn up.

Another good reason to sacrifice the exchange is “If a World Champion like Petrosian used the positional exchange sacrifice so frequently and with such success it means there is nothing wrong with it” (Mihail Marin, *Learn from the Legends—Chess Champions at Their Best*).

## ***POSITIONAL SACRIFICES***

**COMPENSATION:** Compensation for a positional sacrifice is, of course, positional. Structural advantages are the general aim. The creation of permanent weaknesses in the opponent’s position, or the exposing of the opponent’s king in some way that you can exploit, are typical forms of compensation. The exact compensation for a positional sacrifice is often vague and long-term.

Compensation, among many other possibilities, can also take the form of:

- rapid development
- increased piece coordination
- an advantage in space
- disruption of piece coordination for the opponent
- opening of lines

- gaining the initiative
- penetration into the opponent's camp

**WHEN:** Since they are long-range by nature, positional sacrifices often work better when the position is such that the other player will have trouble generating immediate counterplay. **It takes a big mistake from your opponent to justify a piece sacrifice. In contrast, a minor infraction can allow for a positional sacrifice.**

Positional pawn sacrifices are often made on general grounds when the sacrificer thinks that taking the pawn is too risky for his opponent to accept, that the opponent will not be able to avoid tactics favorable to the sacrificer, or that the opponent's position will be irreparably damaged. Surrendering material for positional gains frequently makes your game easier.

**DEFENDER:** The player that accepts the sacrifice usually starts playing defensively. They often end up returning the material in order to regain the initiative or to simplify.

## ***COUNTER SACRIFICES***

**A counter sacrifice can be a strong way to respond to a sacrifice.** To keep the material and run can lead to incurable passivity. If you return the material, you can often neutralize the gained initiative and equalize, or more. Gaining some kind of counterplay after accepting a sacrifice is crucial. A counter sacrifice may even be necessary.

A psychological benefit to the counter sacrifice is that it is often unexpected. It is easily overlooked by the sacrificer.

## ***PASSIVE SACRIFICES***

If a piece is attacked, but remains where it can be captured, it is a passive

sacrifice. Players can be caught off guard by this kind of a sacrifice because they generally expect an attacked piece to move.

## ***DEFENSIVE SACRIFICES***

The defensive sacrifice is not a counter sacrifice or the returning of material from a sacrifice; it is a material sacrifice made while on the defense. The purpose is to take advantage of the positional disruption in the attacker's forces due to the attack. In order to attack, the attacker commonly will decentralize, leave pawn weaknesses, or leave his own king vulnerable to attack. Sometimes, a sacrifice by the defender in these situations can break the attack. A common case is an exchange sacrifice by the defender for a crucial attacking piece, or a queen for a rook and a minor piece.

## ***INTUITIVE SACRIFICES***

Most minor-piece sacrifices are made with deep calculation backing them up. Often, pawn, rook and queen sacrifices are another story. They are frequently made on intuition alone. They are either too subtle or too complex to be calculated with any certainty. You have to save the energy and decide quickly whether to make the sacrifice. It depends on not only the position, but also your style, your opponent, and the time remaining on the clock.

If intuitive sacrifices are not made when they are called for, your play will not improve as much as it could. Learning to trust your intuition is an important part of developing as a strong player. By their nature, sacrifices are extreme. **If you sacrifice and you are wrong, you will probably lose.** On the other hand, **if you do not sacrifice and you are wrong, you might be able to draw.**

# ATTACK

*Attack! Always attack!*  
—Adolf Anderssen

## ROMANTIC ERA

The difference between players today and those of the Romantic era, when attack was king, is mostly that defense is much better today. The improvement in attacking methods is modest in comparison. Players have learned, among other lessons, to return material, to counter-sacrifice, and to avoid passive positions.

Attack and defense entail the same considerations. They are both looking at the same subject, but from a different perspective. It is essential to understand defense when you attack, and vice versa.

## WHEN TO ATTACK

**POSITION:** If your opponent's position is fundamentally sound and he is well developed, you cannot force a successful attack against proper defense. In this situation, you need to try to improve your position while trying to negate your opponent's plans and wait for him to make a mistake. If you have the superior position, you must attack. If you have the worst of it, you must defend. If neither side has the advantage, both sides should maneuver and try to provoke weaknesses until one has the advantage.

**You have to do what the position dictates.** If it is the right time to attack, you attack. If it is not, you do not. **An attack without proper grounds must fail against accurate defense.**

If you love to attack, you can't go after the enemy king in any and all situations. Instead, you have to learn to read the board and obey its dictates. If the board wants you to attack the king, then attack it. If the board wants you to play in quiet positional vein, then you must follow that advice to the letter. (Jeremy Silman, *The Amateur's Mind*)

Yet when the time is right, and your position has improved to the maximum, the attack will pretty much play itself. Attack decisively, but at the right time. **"Once an attacking position is obtained, any hesitation may prove fatal"** (Saviely Tartakower & J. Du Mont, *500 Master Games of Chess*).

**ADVANTAGE:** An attack cannot succeed unless the attacker has the advantage (at least in the area where he is attacking). Furthermore, if you have the advantage, you "should" attack. Steinitz said, **"The player with an advantage must attack, otherwise his advantage will evaporate!"** Many others have confirmed this principle over the years. Kotov & Keres even seemed more emphatic when they said, "The player who has the advantage must willnily go over to the attack" (Alexander Kotov & Paul Keres, *The Art of the Middle Game*). You cannot force your will on the position, but if the advantage is there, you need to attack or you will lose the initiative or the advantage, or both. **Delays can cause problems. Once you determine that you have an advantage you need to decide where to attack and then attack.**

The idea that you must attack if you have the advantage, according to Rubinstein, only applies to dynamic advantages. If your advantage is static, the general rule works in reverse: you have to prevent your adversary from getting counterplay.

At least some of the factors of the position must be in your favor before you will have a reasonable chance of success with an attack. For example, you should have better development, a space advantage, more mobile pawns or better piece activity, or your opponent should have some weaknesses or an

exposed king. **Aim the attack at the section of the board where your advantage is the greatest, where you are the strongest.** “Do not attack where you are weaker, or else it will rebound against you” (Luděk Pachman, *Complete Chess Strategy*). This can mean a part of the board away from the king as much as it can mean an attack on the king. Be sure to have enough coordinated material to successfully carry off the attack and aim it at one of your opponent’s weaknesses.

If your positional advantage is superior piece mobility, attack is usually the prescribed course. If you are behind in material, but the equilibrium is in your favor (you can be material down and still have the advantage), you should attack. Steinitz also said, **“Only the player with the initiative has the right to attack.”**

**WEAKNESSES:** An attack is only justified if your opponent has a weakness or at least a potential weakness. Moreover, focus the attack at the opponent’s vulnerable spots (where he is the weakest).

**DEVELOPMENT:** **Do not attack until you have developed all of your pieces.** That means do not attack, as Blackburne said, “Until your queen’s rook is developed.” **It is rarely a good idea to attack early in the game.** Develop your pieces to good squares and try to create weaknesses in your opponent’s game. An attack without superior development and without the opponent having made a mistake will not succeed with correct play from your opponent. On the other hand, with a lead in development, the attacking possibilities will make themselves known to you.

A lead in development is like the power play in ice hockey (having an extra man on the ice while the opponent has a man in the penalty box). It is a temporary advantage. Like the power play, this is a great time to attack (in fact, little else makes sense). If your opponent has a piece cut off from play at the side of the board but you cannot win it, or the opponent’s queen is cut off from the action on one part of the board, start an attack on the opposite side (since



you are, in effect, ahead in material there).

**CENTER:** If you have to abandon the center, your opponent's attack will develop almost automatically. If your pieces are not positioned for attack, then a central pawn advance is usually not a good idea. You need to position your pieces to support and follow the attack before a central pawn push is recommended.

**KING SAFETY:** Unless you have a forced mate, **do not initiate a fight until your king is safe** (especially if your opponent's king is safe). Do not think about attack before checking your defenses. An attack that is not justified will fail against correct play.

**After winning material, don't immediately attack your opponent.** Instead, quietly consolidate your position by developing all your forces and getting your king to safety. Only when everything is protected and your army is fully mobilized should you start marching up the board. (Yasser Seirawan, *Winning Chess Strategies*)

## ***HOW TO ATTACK***

**TACTICS:** To be successful at attacking play, you must have a good grasp of tactics. An attack is usually made up of an unrelenting string of various tactical blows. At the beginning of an attack, calculate all of the variations as deeply as you can. Simple attacks are often the most effective.

**MOMENTUM:** **Once the attack has begun, it is crucial to keep the momentum.** Once you have started an attack, there is no going back. There is no time for half measures; you must keep the impetus. You cannot give your opponent time to reorganize his position for better defense or you will probably lose. That being the case, it is important to have all of the elements of the attack in place before initiating it.

It can be a good idea, when conducting an attack, to create some one-

move threats along the way to keep your opponent in a constant state of tension. If your opponent has the possibility of mustering a counterattack, all the more reason to keep up the pressure. Your moves must be aggressive.

**INITIATIVE:** “**The key to success is to seize the initiative** to force the opponent to take defensive measures which diverts him from succeeding with a counter-attack” (Gary Lane, *How to Attack in Chess*).

**OPEN LINES:** **Attacks are nearly impossible without open lines.** The attacker should usually open as many lines as he can. This makes it possible to come into direct contact with the enemy pieces and position. Often, this is accomplished by pawn breaks, pawn pushes, or sacrifices. **The player with more levers at his disposal than his opponent has better chances of opening lines.** “No pawn exchanges, no file-opening; no file-opening, no attack” (Aaron Nimzovich, *My System*).

If your opponent’s king is on or close to a file or diagonal that you can open, or is already open, the attack will be stronger. Not only do you need to open the files and diagonals leading to the opponent’s king, but also it is often essential to eliminate the pawns directly in front of it. If the pawns are blocked, a sacrifice may be necessary. Two bishops on adjacent open diagonals from the queenside aiming at the opponent’s castled position is a strong force.

Open lines are the avenues of attack. If you have control over open lines and have the initiative, almost any attack will work. The plan and the tactics will be readily apparent.

**If the open diagonals are predominantly of one color (the opponent’s pawns are on the opposite color), execute your attack on that color since these are weak squares for your opponent.**

Open positions favor the player with a lead in development or piece superiority in the area of the open lines. Therefore, before opening up the position, be sure you are the better developed near the object of attack. **Do not overestimate the value of open lines. They are only of value if you can**

**exploit them.**

**AVOID EXCHANGES:** The **attacker should avoid exchanges.** Do not exchange when attacking unless you see an immediate advantage (exchanges relieve the defending side by giving him more room for fewer pieces).

**REMOVE DEFENDER:** Removing the pieces that defend the opponent's king (or any object of your attack) makes it easier for your attack to succeed. A similar idea is to remove the opponent's best piece. Many attacks are successful because the attacker exchanged his opponent's superior pieces.

An important skill for the attacking player is to know how to create weaknesses in his opponent's camp and then knowing how to exploit those weaknesses. One possible weakness to exploit could be an inadequate defense. To that end, you can lure a defender away.

Sometimes, you can use a sacrifice to divert a defender. A sacrifice can also be a good way to include one of your pieces in the attack that would otherwise not be able to participate.

**MOVE ORDER:** The order of the preparatory moves and the order of the attacking moves are both important. The general rule is that the **“moves entailing fewer obligations should be carried out before those which are more strongly binding”** (Vladimir Vukovic, *Art of Attack in Chess*). This also helps you to disguise your plans a bit.

When calculating a combination you should look at different move orders. If your intuition tells you that there should be a strong combination in the position, but your calculation does not bear it out, try changing the move order. Often, a transposition of moves makes all the difference.

**HINDRANCE:** Making play tough for your opponent is always a good idea. In an attack, breaking up the coordination between your opponent's pieces is one way to hamper his defensive capability. This situation often comes about when the attacker has a space advantage and he drives a center pawn into the position like a wedge that separates the opponent's forces. This can make it

difficult for the opponent to transfer his forces over to the other side of the board to help with the defense.

“Chess is a fight—and it is **sometimes more important to interfere with the opponent’s development than to continue your own**” (Irving Chernev, *The Russians Play Chess*). Try to prevent your opponent from developing. “The first principle of attack—**Don’t let the opponent develop!**” (Reuben Fine).

**FORCE:** You should **put as many pieces as you can in aggressive positions before attacking**. Do so, because not only it will improve your chances of success, but also because, once you have committed to the attack, you are probably going to have to succeed or you will most likely lose. **You should get as many pieces into the attack as you can.**

The basic rule of attacking is that you should position all of your pieces to join in the attack. **You should bring (or point) your pieces to the sector of the board where the attack will take place. The strong attacker does not attack until all of his pieces are developed and ready to be included in the attack.** There are exceptions. Sometimes, you need to “strike while the iron is hot.” Sometimes, you will need to attack without every piece being involved, but, in the majority of cases, you should include all of them.

You need to coordinate your pieces. You cannot attack with one piece at a time. The combined forces, acting together, are what make a successful attack.

You should not place the queen too close to the action or it might be harassed or exchanged. You should not place the queen too far back because you might lose energy in your attack. A typically good distance is often about the third rank.

**The likelihood of success of an attack has more to do with the relative number of attacking pieces to defending pieces than it does with the power of those pieces (for example, minor pieces vs. major pieces).** All pieces tend to become worth about the same as each other during an attack. If a piece is worth more than another it has more to do with its function in the

attack than its normal value.

**If an attack can succeed with pieces alone, then leave the pawns where they are.** They can be useful as defenders.

Alekhine said that castling is an attacking move! This is because castling connects the rooks and makes them ready for action anywhere on the board. **From a tactical point of view, the effect of castling is even greater when there are open files in the center and the opponent's king has lingered there.** (Nikolay Minev, *Mastering Tactical Ideas*)

**AFTER ATTACK:** After a successful attack (other than a mating attack), the nature of the position will be different. Pieces will be out of play. The play often changes to another part of the board. Strategies change. Your initiative is gone. It is important to consider all of this before initiating the attack (to be sure the resulting position is worth the potential gains from the proposed attack). **Try to plan your attacks so that the resulting position does not leave you without resources.** “Set up your attacks that when the fire is out, it isn't out!” (Harry N. Pillsbury).

**UNSOUND:** If your attack proves to be unsound, it is often wise to **continue the attack nonetheless.** This is because, if you waver, you are probably going to lose anyway, but, by continuing the attack, **you might be able to pull off a swindle.**

Defended: If your opponent defends against your main attacking plan, he probably had to give up something in order to do it. So, look for another plan based on what he may have given up to stop it.

There is an important rule to attacking chess: **If your opponent succeeds in preventing your primary attacking idea, this is often at the cost of something else.** So do not abandon the attack, but rather investigate the arising position (in advance of course), and see if new possibilities have

arisen. (Jacob Aagaard, *Excelling at Combinational Play*)

**LEARNING:** To become a good attacker you need to learn to recognize patterns. You need to learn how to visualize, and you need confidence. You have to learn to sacrifice material without fear. A thorough understanding of combinations and tactics is essential.

Fix Target:” A prime rule of attack is to **fix a target before striking**” (Mark Buckley, *Practical Chess Analysis*).

**ATTITUDE:** The attacking player should not mind complication. He is creative, likes imbalances, is willing to sacrifice material and is comfortable with tactics and combinations. **The time for caution and doubts are before the attack.** Once the attack is launched, be razor-sharp, steadfast, and ruthless. Almost everybody has trouble when under a relentless, heavy attack (especially attacking players themselves).

## **WHY ATTACK**

**TO WIN:** You must attack in order to win. “In chess, as in any conflict, success lies in attack” (Max Euwe). You cannot be timid in chess; you have to fight. Generally, you cannot win without attacking. **“In chess only the attacker wins”** (Alexander Kotov, *Train Like a Grandmaster*). A strong player might be able to get away with passive play, waiting for his opponent to make a mistake, but for the average player or beginner it is a losing idea. The average player has to be aggressive, it is the only way for him to win (or improve).

**DUTY:** If you have the advantage, you have the duty to attack. It is necessary to attack, or you risk losing the advantage.

**ADVANTAGEOUS:** It is not only true that you must have the advantage to attack, but the attacker has an advantage because he is attacking. Another advantage of attacking is that it is better than being attacked. “The game of chess is not a mathematical puzzle but a battle, and **in any battle the**

**attacking side always has the advantage”** (Rudolf Spielmann).

**PSYCHOLOGICAL:** There can be psychological advantages to attacking. Aside from the obvious psychological pressure you exert during the game itself, being generally known as a fierce attacker can reap rewards. “If you can somehow develop a reputation as a strong and dangerous attacker, your opponent may well become frightened, and in poker terms, can sometimes bluff himself out of making the best moves” (Colin Crouch, *Chess Secrets: Great Attackers*).

## ***MATERIAL IN ATTACKS***

**MINOR PIECES:** Usually, the bishop pair is better for attacking than two knights; although, two well posted knights (for example, centralized or on the sixth rank) can be equally good. The key piece for many attacks is the king’s bishop. The bishop is best when supported by other pieces. Bishops are not strong by themselves.

**OPPOSITE-COLORED BISHOPS:** Bishops of opposite-color can add a lot to an attack because the opponent’s bishop cannot defend what your bishop attacks. It is like having an extra piece. With opposite-colored bishops, seize the initiative, play with great energy and attack the king.

**ROOKS:** The attacker should try to make his rooks more active while trying to keep his opponent’s rooks more passive.

**ROOK + KNIGHT:** The rook and knight usually do not work that well together.

**QUEEN + KNIGHT:** Queen plus knight is a good attacking combination, especially if they are near the opponent’s king. Many books claim that the combination queen + knight is stronger than queen + bishop; however, master game results do not show this to be true.

**QUEEN + BISHOP:** If you are attacking the king with a bishop and a queen

on the long diagonal, **it is best to put the queen in front of the bishop** (because the bishop cannot block the king's escape squares as well as the queen can).

**QUEEN + ROOK:** One of the basic rules of attack is to **avoid putting your queen in front of your rook. It is usually better to have the rook in front of the queen when playing on an open file (especially a rook file).** The rook checks first on the eighth rank while the queen cuts off his escape squares.

**PIECES OR PAWNS:** Often, there is a question of whether to attack with pieces or pawns. If you have an advantage in piece activity, and your opponent's weaknesses are bad enough to limit his activity even more, then an attack with pieces is probably better. If he can defend all of his weaknesses, though, an attack using pawns may be called for. You can use the pawns to attack the pieces directly, or by pawn breaks to open lines and make squares available for your pieces.

At some point in any attack, if you need more firepower, do not forget to consider the pawns. Another factor is whether you and your opponent have both castled on the same side. Same-side castling makes using pawns for attack risky, whereas opposite-side castling calls for a pawn storm.

## ***FORCE/NUMBER IN ATTACKS***

**THREE:** There is a rule of thumb that, usually, **at least three pieces are needed for a successful attack: one piece to sacrifice and bring the king out into the open, one to protect the mating piece, and one to deliver mate.** Three pieces can prevail against a poorly guarded king, but **more pieces might be necessary to counter successfully whatever defending pieces there are.**

**MORE:** In order for an attack to succeed, the attacker must have some kind of superiority. Your attack is much more likely to succeed if you have more pieces attacking than your opponent has defending. This means not only



in the beginning of the attack, but during the course of the attack as well. You need to be able to bring more force to the attack than your opponent can gather for the defense. **Remember to count the king as a defending piece** (or as an attacker in some cases).

The most important condition is not necessarily to have more pieces on the board, but to have more pieces attacking the part of the board where the action is taking place. One way to do that is to start an attack on the side of the board where you already have the most pieces. Keep in mind that knights are slower at getting back to the scene of the action. Therefore, if your opponent has a far away knight, it might not be able to get back to the defense in time. The greater the difference in force is, the better the chances are that the attack will succeed.

It is well known, from the science of warfare, that sufficient attacking means are necessary in order to conquer defending forces. Even Napoleon (a chess player, by the way) knew that superiority in numbers was not the only way to assess an advantage. Still, outnumbering your opponent (having a preponderance of force) is certainly a big factor.

**MANY:** It takes more than one or two pieces for an attack to succeed. Many coordinated pieces are required. **Not all of your pieces must be in the attack, but the more the better.** If the attack is an intuitive one (in other words, not calculated to conclusion), you should try to use as many pieces as possible in the attack. Attack in number; do not rely on a few pieces.

**ALL:** It has been said that a great attacker does not attack until all of his pieces are developed and involved in the attack. Involving every piece in the attack, even from the remotest parts of the board, significantly increases the odds of success.

**EXCHANGES:** The number of threats made by the attacker is based on the size of his attacking force. For this reason, **you should avoid exchanges until your opponent has to make concessions that are favorable for your**

**attack.** When you do exchange, exchange your opponent's pieces that are more active for your less active ones. "Many chess players have groundless fears about exchanging queens in attacking positions. **The exchange of queens in no way lessens the attacking prospects**, assuming that the opponent's queen is more active than one's own" (Luděk Pachman, *Modern Chess Tactics*).

## **WHERE TO ATTACK**

**SPACE:** Attack on the side where you have more space. That will give your pieces more freedom to position themselves more effectively, while simultaneously hampering your opponent's ability to defend.

**PAWNS POINTING:** In closed positions or semi-closed positions, **an attack is usually indicated by the direction that the center pawns are pointing** (connect the dots). With a locked center if the white d- and e-pawns are pointing toward the kingside (pawns at d4 and e5 for example), that is where you should attack (the kingside). With pawns at e4 & d5 though, a queenside attack is indicated. Another indication is the base of your opponent's pawn chain (which, with a closed center, is usually in the same direction as the direction your pawns are pointing).

**WEAKNESS:** Focus **an attack on the opponent's weakest point** (the weakest square is the one with the least amount of protection). With an attack on the king, the focus is usually on the weak squares surrounding the king.

**FORCE:** Attack away from defenders. **You should attack where you have a material preponderance.** If you have an opponent's piece trapped on the edge of the board, attack on the other side of the board.

Remove defenders. **The strongest defensive piece is a knight at f3.** A good start for an attack might be to chase the knight from this good defensive position.

**ADVANTAGE:** Attack where you have the advantage. Develop the initiative where you are better.

**FIANCHETTO:** When you have a fianchettoed bishop, you should generally **look in the direction your bishop is pointing for the object of your attack**. The bishop usually exerts a strong force along the diagonal on which it occupies. **The attack is usually made possible by pushing the pawns that are located on the side of the board to which the bishop points**. For example, if your bishop is fianchettoed at g2, it is pointing to the queenside, so pushing the queenside pawns would be the typical strategy (especially if you also have a queenside pawn majority).

**KING:** Always examine any move that affects the enemy king. Always examine any checks, captures, recaptures and moves that block an escape square.

The most critical squares around the kingside-castled king are those that are only protected by the king. Of those, g7 and h7 are the most likely squares to be attacked, since these squares are the most reachable squares near the king for the attacker. The h7 square is the more likely of the two to be attacked (especially if there is no knight on f6) because it can be reached by a bishop from d3 or a knight from g5. The same knight can only reach g7 from f5 or h5, both of which are harder to get to for the knight than g5. Additionally, g7 is easier to defend than h7 because the king's bishop can defend g7 from f8 or f6. On the other hand, attacks on g7 are more dangerous than those on h7 are because there is less chance of the king slipping away by way of f8.

If you want to attack the castled kingside position and the opponent's kingside pawns are on their original squares, because there are no weaknesses, you will usually have to exchange, or drive away, the knight on f6. Then, you will usually focus the attack on h7 or g7.

Attacks against the fianchettoed bishop with pawns on f7, g6 and h7 usually proceed along the unoccupied weak squares or by pushing an f-pawn or

an h-pawn to open a file by exchanging the g6 pawn. The f7/g6/h7 structure is weak unless there is a bishop on g7.

An attack is much more effective if the queen has play near the opponent's king. Pawns on the fifth or sixth rank near the king are also effective in attacks on the king. "On the chessboard, an open line, a file or a diagonal, means an opportunity to attack. If a king stands on, or close to, that line then the opportunity is greater because the attack will be stronger" (Tony Gillam, *Attacking the King in the Center*).

## ***ATTACKING WEAKNESSES***

**Attack the weakest point in the opponent's position.** Only attack weaknesses, if there are no weaknesses, you do not have an attack. Not even brilliance will help if the weakness is not there to begin with. You cannot just pick a target; you have to direct the attack at the weakest point in the opponent's position. It is good to attack weaknesses on both sides of the board alternately.

## ***KINGSIDE ATTACKS***

**PAWN WEDGE:** A pawn chain driven deep into your opponent's territory can be an effective device for isolating his forces. The pawn wedge can make it difficult for him to transfer his pieces, from one side of the board to the other, to help with his defense. Likewise, the reverse will be true for you. Since the wedge gives you more space, you should be able to swing more forces over to the attack.

**INITIATIVE:** As in all attacks, it is important with kingside attacks to keep the initiative. At some point during the attack, the defender might try to defend by giving up some material. **Often, winning material can cost you the initiative.** Be sure, if that happens, that it is a good bargain for you.

Beware that, after winning material in an attack, your pieces are not so out of play as to cost you more than the gained material was worth.

**WEAKNESSES:** The enemy king does not have to be defenseless and out in the open to be a target; one weak square can be enough. That being the case, **the first step in a kingside attack often is to provoke a pawn weakness.**

**WHEN:** When your king is safe and your opponent has a weakness in his position, you can start an attack if you have an advantage in force near (or aimed at) the opponent's king. Unless his king is exposed or restricted in some way, you will also need to consider what defensive forces your opponent can muster.

**PAWN COVER:** Most of the time, an attack on the castled king is conducted by pieces alone (after forcing or provoking a weakness in the opponent's pawn cover). The speed of getting these pieces into the attack is crucial. **The typical weaknesses that are provoked are from pawn pushes to h6 or g6.** The move h6 is generally a little less weakening than g6. The pawns can be weakened by captures as well. The pawn shelter can also be breached by a sacrifice. The player doing the sacrificing should have pieces in reserve waiting to enter into the attack.

If one or more of the pawns in front of the king have moved, it is much easier to force a file open with a pawn push. If the pawns remain in their original position, the defender can move his pawns in such a way (as the attacker's pawn get closer) to close the file rather than to let the attacker open it.

**HOW:** When preparing the attack on the king, it is important to **make moves with the least commitment first.** Make moves that will still be useful and strengthen the position in case the attack does not develop.

An attack with your kingside pawns is usually a risky choice if the center is not blocked. If the center is open, the defender has too many ways to get counterplay.

The way to exploit an opponent's king's pawn cover after he has played h6 is usually to push the g-pawn to g5 with the idea of opening the g-file, or to try to coerce the opponent to play g6 so you can get play against his weakened h6 pawn. If these methods are not advantageous, a sacrifice on h6 or f6 might be in order.

Any pawn moves around the king create weaknesses. Target the weaknesses that they have created. Try to hinder your opponent's pieces from entering into the defense. Two important elements in the attack are the balance of forces near the king (or aimed at it), and the condition of the defense. Become familiar with the standard sacrifices and mates and look for those patterns.

A white knight at f6 working with a rook is a powerful combination. A knight and a queen is another strong combination. The knight's short-range (unusual) moves can penetrate many positions. It complements the moves of the long-range rook and queen. This makes the combination of knight and rook or knight and queen perfect for an attack against the king.

There are five main targets near the castled king: h7, g7, f7, g6 and the dark-square fianchetto weakness (with pawns at f7, g6, and h7).

## ***ATTACKING THE KING (CASTLED SAME SIDE)***

In the case of same-side castling (kingside or queenside), it is best to have a space advantage on the side of your attack. **You should have the means to be able to transfer material to that sector, and you should have a material advantage in that area.** If you and your opponent are castled on the same side, **attack with pieces, not pawns.** Using your pawns to attack would leave you vulnerable to a counterattack.

**Rook lifts** (bringing a rook to the third rank and then over to the attack) **are preferred to pawn storms.** If the center is blocked, or you have a firm central pawn structure and your opponent is not in a position to be able to

make a counterstrike in the center, then a pawn storm might be possible.

## **WING ATTACKS/FLANK ATTACKS**

**BLOCKED CENTER:** A strong central position produces better conditions under which attacks on the wings become more likely to succeed. Closing the center, either by exchanges or by pawn advances, is one way to prepare a wing attack. If you already have a closed center, a wing attack with pawns is called for. With the gained space, you can bring your rooks into the attack.

You should have some control over the center (or at least equality there) or the center should be blocked before you start a wing attack. Otherwise, your opponent might gain control over the center and be able to put an end to your attack. There are plenty of exceptions to this advice. It is sometimes possible to launch a successful wing attack without equality in the center. Although, if your opponent can open the center, get piece play in the center, or get play through it, your attack is more likely to backfire.

A cardinal principle of defense is that **a wing attack is best met by a thrust in the center**. Therefore, control of the center (or an advantage in the center) is your best security for your wing attack. Conversely, **an attack in the center can sometimes be met by a counterattack on the wing**.

**PAWNS:** Usually, a queenside attack (with both kings castled kingside) will involve the use of pawns. Normally, at least one pawn is pushed in order to open the position. **A queen-side attack with pieces alone is unusual.**

**PIECES:** If your opponent is putting his pieces on the wings for an attack, he is not using them for control of the center. So, when your opponent starts a piece attack on a flank at an early stage of the game, the best reply is a counterattack in the center, or a counterattack on the other wing, or both.

**OBJECTIVE:** Typically, the object of a queenside attack is to open some lines in order to infiltrate the opponent's position. The object of a queenside attack can also be to gain material or to acquire space or mobility. Sometimes,

there are no tangible targets, just a weakness to exploit. **Often, a queenside attack develops into a kingside attack after the attacker gets rook access to the seventh and eighth ranks.** A queenside attack can also be a counter to a kingside attack.

**CAUTION:** An attack on the king can decide the game, whereas a queenside attack is unlikely to produce immediately decisive results. For that reason, the queenside attacker must pay close attention to what is going on near the kingside. Success might depend on combining the queenside attack with preventive or offensive actions on the kingside.

**WHEN:** If your opponent has weaknesses on the queenside, an attack there is possible. If the position of the forces or the piece concentration gives you a material advantage in that sector, a queenside attack might be called for. In addition, if you have a space advantage on the queenside you might consider an attack there. A pawn majority on the queenside could also give you reason to attack there. Pawns pointing at the queenside are another sign to attack on that side. Sometimes, a minority attack is also possible on the queenside.

**QUEENS:** Queen exchanges are usually better for the player who is attacking on the queenside. This is because, without a queen, the kingside attacker (the opponent) is generally less able to mate the king.

**SPACE:** A space advantage on the wings can be beneficial for a piece attack, it can facilitate the advance of your pawns in order to open lines, or it can help restrict the opponent's position. **An effective scheme with wing attacks is to start an attack on one wing; then, after the opponent has deployed his forces to the defense of that wing, abruptly switch your attack over to the other flank.** It can be difficult for the opponent to redeploy his pieces because your space advantage has probably hampered his mobility.

## ***OPPOSITE-SIDE ATTACKS***



**PAWN STORM:** When both players have castled on opposite sides, the usual strategy is to initiate a pawn storm against the opponent's king. The idea is to open lines for the attack by way of pawn exchanges. Both sides can initiate these pawn storms because the pawns are not being moved in front of their own kings (the moves are not weakening their own king's protection).

There is a balance to consider. Advancing too many pawns takes a lot of time, and advancing too few pawns might not be sufficient. The rule is to **advance only enough pawns to produce a decisive weakening of the opponent's position**. Sometimes, one pawn is enough. Both players should not lose sight of the importance of the control of the center, even during opposite-side attacks.

As the defender against a pawn storm, **you should avoid making pawn moves on the side where you are defending**. Such moves would only accelerate your opponent's attack.

If the opponent has pieces in the way of your own pawn advance, that is good for you because you can use the tempos gained by attacking them to further your attack. Be on the lookout for such opportunities.

**INITIATIVE:** The most decisive results occur in games with opposite-side attacks because of the great imbalance of the position. One side is usually going to win. There are fewer draws in these kinds of battles. It is essential to get your opponent to react to your threats, so he will not have time to develop his own.

With mutual attacks involving opposite-side castling, **the initiative is crucial**. The first to get it will usually win. Anything can happen. It is important to play with efficiency and speed. **Retreating from your attack for defensive reasons is often fatal**. That is likely to give your opponent the time he needs to make his own attack decisive.

Defense may be necessary at times, but **the first player to go on the defense is probably going to lose**. You frequently have to make material or

positional concessions to get the initiative. As a rule of thumb, **with opposite-side castling, the initiative and an open file aimed at the opponent's king are worth a pawn (or more)**. "In pure attacking races with kings on opposite wings, anything can happen. The most critical question is who can maintain the initiative?" (Lev Alburt & Danny Kopec, *Winning the Won Game*).

**TEMPO:** Time is crucial. Every move you make must be necessary and effective. Many games with mutual opposite-side attacks are decided by one tempo. **One inaccurate move may be enough to cost you the game. One lost tempo could prove to be fatal. He who gets there first usually wins.** The goal is to get to your opponent's king before he gets to yours. You need to launch pieces and pawns together against the opponent's king immediately. **It is a race.** The first one whose attack breaks through usually wins. **If you hesitate or lose confidence, you will be crushed.**

Sometimes, you have to take time out for a defensive move, but if you become too occupied with what your opponent is doing, you might not get your own attack mobilized in time. Taking one move to defer your opponent's attack by two moves is probably okay, but you should weigh each defensive move carefully to see if it is worth the tempo it uses. Keep in mind that the best defense to a flank attack is usually an action in the center. This still applies. However, if such a move is not practical, the tempo of the attack becomes the primary factor.

**OPEN FILES:** The idea of a pawn storm is to open files. It is vital to open files in front of your opponent's king. **It easily can be worth a pawn to open up a file leading toward your opponent's king** (especially the rook- or knight-files). Use open files and semi-open files to get at the enemy king. When you get a file, line up your major pieces on it and use them to penetrate for a mating attack. **The side that first opens a file against the other's king usually wins.**

**MATERIAL:** The balance of material is not as important in opposite-side

attacks as it is in other attacks. **Sacrifices, for the purpose of breaking through the defense or accelerating the attack, are common in opposite-side attacks.** If the opponent's extra material is busy preparing for an attack against you on the other side of the board and not directly involved in the defense of his king, it is of no real value... if your attack comes first. Winning material is also of little value, especially if it causes you to lose the momentum of your attack.

## ***TEMPO OF ATTACKS***

If you have a strong attacking position, you should not be hesitant. You must carry out the attack with a sense of urgency. You should not waste any time. **A lost tempo might be all your opponent needs to consolidate his defense.** You need to play assertively. A forceful attack often requires that you ignore material, either by leaving pieces hanging or by making sacrifices. It is important to incorporate as many pieces as possible into the attack, but castling can sometimes slow the tempo of the attack. Because of that, you have to weigh the advantages.

If your superiority is not clear, the tempo of the attack must be slower than when you have a big advantage. **The smaller your advantage, the slower you should pace the attack.** At a slower pace, you should take advantage of your strengths and try to improve your position. The plan becomes more important than the tempo of the attack.

Another factor in the tempo of an attack is the opponent's counterplay. If he has no counterplay, you can improve slowly. If he has adequate counterplay, you must act quickly.

## ***ATTACKING THE KING IN CENTER***

**VALUE:** The center is where most of the fighting takes place and where

the pieces have their most power, so it is a risky place for the king to be trapped. Bronstein said that **it is usually worth a pawn, and sometimes a piece, to keep a king trapped in the center.** Tal said that when his opponent's king is still in the center, on every move he looks for a way to attack it, even if he knew it was safe. Khalifman has said that, **almost inevitably, one must sacrifice something to be able to keep the opponent's king in the center and under attack.** Alekhine said that **having your opponent's king caught in the middle and under attack was usually worth a piece.** Moreover, Dvoretsky has said that **it is usually wise to incur a small loss of material in the opening to get the opponent's king trapped in the center and to seize the initiative.**

**HOW:** Most of the time, **if your opponent's king has lost the right to castle, and his king is exposed or vulnerable; it is justified to commence a mating attack.** You can carry out an attack against the uncastled king by attacking on the file that the king is on (usually the e-file), or by attacking by way of squares that are only protected by the king (usually f2 or f7). If the king has not lost the right to castle, it is important to try to prevent him from doing so.

When attacking the king in the center, try to open lines for your rooks, bishops and queen, and bring in as much firepower as you can. Exchange your opponent's best defensive pieces, but avoid most other exchanges.

**INITIATIVE:** The key, to attacks involving your opponent's king being trapped in the center, is to keep the initiative. Do not give your opponent a chance to remove his king from danger or to bring defensive pieces into the game. Every move should contain a threat in order to keep your opponent too busy to get away.

**DEVELOPMENT:** **If you have a lead in development and your opponent's king is still in the center, it is a clear signal to attack.** A successful attack on the king caught in the center hinges on bringing more

force to the crucial sector. **It is usually better to bring more pieces into the attack than to grab material.**

**PAWNS:** A king in the center is always in danger unless the center files become blocked by pawns. This is especially true if the e-pawns are exchanged. If the e-pawns are exchanged, the e-file becomes a means of penetration for the queen and rooks. **Pawn exchanges are generally disadvantageous to the player with his king stuck in the center.**

In case your king by the irony of Fate has found no shelter at the either side of the board and has been compelled to remain in center under the constant control of the opponent's pieces, you should do the best to leave on board as many pawns of both colors as possible. (Alexander Khalifman, *Shirov's One Hundred Wins*, Sergei Soloviov)

**ROOKS:** A common theme, when attacking a king stranded in the center, is the use of rooks on open files. Using the powerful rooks on an open file directed at the stranded king is an effective device for the attacker.

When the king is no longer in the middle of the board central combinations lose in interest. The main object and the principal spoil are lacking. When the king has not moved the combinations present remarkable features. The most common is the entry of the rooks on open files. (Eugene Znosko-Borovsky, *The Art of Chess Combination*)

One of the advantages of attacking a king that is still in the center, or forcing your opponent to lose the right to castle, is that **his rooks are probably unable to connect**. More than that, they are **likely to be trapped on the sides of the board**. This makes the full coordination of his pieces more difficult. The other pieces will be forced to squander valuable time trying to defend the besieged king. This lack of coordination can present you with the ability to gain control of an open file with your rooks. Sacrifices are often

beneficial under these circumstances, since you will have more firepower directed at your opponent than he will have with which to defend.

## ***KING HUNTS***

**INTUITION:** When a king hunt is in the making, consider all of the forcing moves, especially ones that draw the king out. Although, **the king hunt is generally more of an intuitive pursuit.** Usually, you cannot calculate all of the lines fully. You simply have to know that the king is in too much danger to survive. As long as the king is driven out into the open, a king hunt is usually worth conducting. Keep in mind that **checkmate is more difficult in the center of the board than in the corners, but you can get a lot more firepower there.**

**INITIATIVE:** When king hunting, you have to attack the king constantly with no let up. Checks or threats should be a part of every move. You must keep the initiative and not give the opponent a chance to find safety.

**RESTRICTION:** **The basic idea is to restrict the king.** Korchnoi said that **if there are too many checks, there is something wrong with your attack.** The point is that restricting the king gives you a better shot at checkmate than chasing it around does. That is why a boxer is taught to cut off the ring instead of chasing his opponent around the ring.

**KING AND PAWNS:** If you get your opponent's king flushed out into the open, do not forget that you also have pawns and a king that you might be able to use effectively in the attack.

## ***ATTACKING MOTIF***

The way to attacking mastery is to learn the basic attacking themes and objectives in as many important positions as you can. Then, you will recognize the pattern of a typical mate in a given situation. The pattern, in turn, will

guide you in the right direction for your attack. **If you have a choice between more than one attacking ideas, choose the one that is the simplest and most direct.**

You can make it more difficult for your opponent to organize a proper defense by choosing a subtle attacking theme or by creating simultaneous threats. “The more subtle the attacking motif, or the more threats that can be created simultaneously, the more difficult it will be for the opponent to mount an adequate defense” (Rashid Ziyatdinov & Peter Dyson, *GM-RAM*). Whatever theme you choose, be sure to do it quickly. The situation changes rapidly and, if you do not act quickly, the theme will soon be gone.

## ***ATTACK AGAINST FIANCHETTO***

**BISHOP EXCHANGED:** One of the main ideas when attacking against a fianchettoed bishop is to eliminate that bishop. If you can succeed in doing so, your opponent will be left with a serious weakness. He will be left with a complex of weak squares (that used to be covered by the bishop). The castled position, then, becomes weak and vulnerable. **Normally, you should exchange the opponent’s fianchettoed bishop before you even try to attack the king position.** If you cannot exchange the bishop, getting your opponent to play the bishop back to h8 (h1) is often as good since you will have h6 (h3) under control.

The “Achilles heel” of the fianchetto position is undoubtedly the square R3, which normally has only the bishop to guard it. If the opponent can force his way into this point with a bishop, backed up usually by the queen, then the only good defense is B-R1, leaving the position blocked, and the square N2 still protected by the fianchetto bishop. However, if the defending rook is still on B1, then this maneuver is obviously not possible. (J.B. Howson, *200 Modern Chess Traps in the Fianchetto Openings*)

**PAWNS:** The basic method of pawn attack against the fianchettoed bishop position is to push your h-pawn. The pawn at g6 (g3) becomes a target for the h-pawn to open up the h-file. **The exchange of the fianchettoed bishop and the h-pawn push are the principal techniques used against the fianchettoed king position.** A pawn storm can also be effective.

**OPPOSITE FIANCHETTO:** There is a general principle that you should not use a queen fianchetto against a king fianchetto. That only applies, though, if the queen bishop is unprotected. If it is protected, the opposite fianchetto can be an excellent way to exchange off the king bishop. Your queenside is then weakened and his kingside is weakened, but the kingside is usually the more important.



# DEFENSE

*Chess is a matter of subtle judgment—knowing when to punch and when to duck.*

**—Bobby Fischer**

## ***ABOUT DEFENSE***

The great attacking geniuses (Morphy, Spielmann, Tal, Alekhine, et al) have given us all some great thrills, but the great defensive geniuses (Steinitz, Reshevsky, Smyslov, Capablanca, Petrosian, et al) usually had more tournament successes. There are many good attacking players, but **good defenders are rare**. Yet being able to defend is as important as being able to attack. **It might even require a better command of tactics to defend well than to attack well because the attack can be based on general principles, but the defense must be tactically specific.**

It is an important first step to be able to realize when you are on the defensive. If you do not know soon enough that you have an inferior position, and you do not start to take the appropriate action, it is easy to get into a situation in which you would be unable to organize an adequate defense. **Do not play defensively unless it is necessary.** However, if it is necessary, then not playing defensively is a mistake. The general principles of defense are, as you might expect, the general principles of attack in reverse.

Defense is not only for bad positions. You might have the advantage, but because of an immediate threat or a temporary initiative, you might need to defend. An example would be when you are on the receiving end of an unsound sacrifice.

Some say defense is harder than attack because, if you are defending, you are often cramped, there are usually fewer options, and often there is only one good way to survive. Errors are much more common in defense than in attack.

When the attacker makes a mistake, he might lose time or the initiative; however, errors on defense are usually more serious.

Still others say that it is easier to defend because the attacker has to find the way to keep the initiative against all possible defenses. Over and above, the attacker is usually busted if the attack does not work, because his pieces will be out of play. Another common reason that the attacker can be busted (if his attack does not work) is, if he has sacrificed material, he is left down material without compensation.

## ***ACTIVE/PASSIVE DEFENSE***

**ACTIVE:** Defend actively instead of passively. Completely hopeless positions are rare when you defend actively. It is usually a good idea to try to defend by activating your pieces. Being active will be useful after you have successfully defended the attack. It might even make it possible for you to begin an immediate counterattack. Responding to threats or trying to prevent certain moves is not enough because the attacker can usually adjust to the situation and keep up the assault.

To have a good chance of success, you will need some sort of counterplay. A side benefit to counterplay is that the attacker knows that if his attack fails, he will be in some trouble. Because of that, it puts some psychological pressure on him as well as the positional pressure. So, **when under attack, think first about counterattack**. Try to develop a plan built around a disguised tactical shot.

**PASSIVE:** There is a certain skill to passive defense, and it can be a workable alternative in the right hands under the right circumstances. Nevertheless, usually, **passive defense is not advisable**. The idea of a passive defense is to hold the line and not give up anything. It can be a psychological ploy for the defender because you become the one choosing the terms of the battle and the burden is on the attacker to force the issue. Sometimes, an

attacker will falter under these conditions.

Even retreat is sometimes necessary in defense. Retreat can possibly be followed, later, by an offensive from the retreating player. However, usually passive defense is a mistake. It is easier to make mistakes and serious blunders when playing passively. “In the majority of cases, it is better to play actively, for passive defense frees your opponent’s hands, and he will then probably find one means or another to break through” (Mark Dvoretsky, *Dvoretsky’s Analytical Manual*).

## **STRATEGIES OF DEFENSE**

**ECONOMY:** The defender should **take the minimum risk and use the maximum in economy to stop an attack.** He should **make as few concessions as possible.** He should **make no superfluous moves, and should not use more pieces than necessary for defense.** The proper way to defend is to **evade the attacker as economically as possible.** Do what is necessary... no more, no less. You should **keep your own pieces as aggressively active as possible.** Do not guard against non-existent dangers. **Only defend against direct threats.**

Use as few pieces as you can to defend (even when defending the king); keep the other pieces available for offense. **Avoid cramped or passive positions.**

If your position is not inferior to your opponent’s and he prepares to attack you anyway, you can be so economical as to all but ignore him. Instead, develop your pieces aggressively and defend his attack as economically as possible and, at the same time, start a counterattack.

**STRENGTHENING:** One of Steinitz’s principles of defense is to **strengthen the lines of least resistance.** Keep all of the lines of resistance equally strong and **do not allow any weak links** in the chain.

**PREVENTION:** Strengthen weak points (and remove possible tactical threats) in advance of an attack if it takes less time and material than to defend against an attack. Such **preventive measures are wise only if it is more economical to tend to them in advance than if under attack.**

A complete defence includes the whole board. The attacker can shift focus from one sector to another, so all sectors need to be defensible. Try to interfere with the coordination between the opponent's attacking pieces.

**WEAKNESSES:** Avoid positional and tactical weaknesses, especially near your king. Do not weaken any squares unless it is necessary to do so. Take care of any weaknesses as soon as possible. **The defender should be aware of the weakest spot in his position and bring more material to reinforce it.**

**PAWNS:** Watch for the attacker to make committal weakening pawn moves that you can take advantage of if his attack is unsuccessful. **As a defender, do not make pawn moves that are not necessary. If you cannot find a good move, it is usually better to maneuver, even if it is by moving a piece back and forth. "Never unnecessarily weaken the pawn position where the opponent is attacking"** (Rashid Nezhmetdinov, *Nezhmetdinov's Best Games of Chess*).

Often, it is best not to capture an enemy pawn that is directly in front of your king. Many times, you can use such a pawn as a defensive shield against attack (it cannot be captured by your opponent).

**DETERIORATE:** Do not let your position get worse. Have a plan. If you have no plan, you will be giving your opponent the opportunity to improve his attack gradually.

**PSYCHOLOGICAL:** If your defense is tenacious enough, the attacker might get desperate and make a bad move. **Most players will tend to make mistakes if they are confronted with a determined defense.** An attacker is usually much more attuned to his own tactical threats than to his opponent's

threats. Be alert for this kind of complacency.

**A sudden change into an endgame can throw an attacker off his game.** Often, they will unwisely try to persist with the attack or unfavorably avoid exchanges to keep in a middlegame.

When defending, keep calm. It is a good idea to look for creative and implausible moves. The attacker has probably counted on the obvious replies. Examine the obvious replies, of course, but consider taking your opponent out of his game plan. Doing so might end up being the best choice (because it could be psychologically unsettling for him). Confuse him. **Play a move that you would not want to face if you were the opponent.**

**RETURNING MATERIAL:** One defensive method is to return material at the right time. Done at the right time, **returning material can enable you to regain the initiative.**

If a sacrificial attack was started from a superior position, **the defender usually needs to return more material to repel the attack** than the attacker initially sacrificed. Returning just the sacrificed material is rarely enough.

**COUNTERPLAY:** One strong way to defend is by mustering up counterplay to ward off the attack. If nothing else, the counterplay might deflect enemy pieces from the attack. The counterplay might not lead to a win for you, but it might be enough to force a draw.

If the attack fails, the attacker's pieces and pawns are often in disarray. His inaccurate pawn moves will frequently leave weaknesses. These could become targets for your own counter offensive. His pieces are likely to be misplaced and the center may have been abandoned. These could be opportunities for you to gain some counterplay.

**CHANGE:** Suddenly changing the character of the position can make it hard for the attacker to adjust. He might start making mistakes as a result.

**OBSTACLES:** Put as many obstacles in the attacker's way as you can. Do not depend on just one line of defense.

**INITIATIVE:** When your opponent has won some material or has a big advantage, he is liable to relax a bit. This is the best time to gain the initiative. If you can gain the initiative, even by giving up some material, you might be able to complicate the game enough to cause your opponent to make some mistakes. As well as, with the initiative, you have a chance to find, and force, a perpetual check.

**SPECIFIC MOVES:** The best defender of g7 is a bishop on f8. One of the most economical ways to defend h7 is with a knight on f8. The knight on f6 is not as good as a defender because it is subject to attack by pieces or pawns and it is even susceptible to exchange sacrifices. The knight on f8 can also move to g6 to block the g-file if necessary. When the king is castled queenside, the knight defends similarly from b1 (b8). Bishops can be useful for the defense of the castled king, especially if the pawn structure has been shattered.

A knight cannot attack two squares of the same color at the same time. Keeping this in mind can help when it comes to deciding where to position your pieces under the threat of a menacing knight.

Moving the rook from f8 to e8 is a valuable defensive move (as well as being an aggressive move) because it allows an escape square for the king if it is under attack. It also frees f8 for a defending piece (such as a knight). That defending piece can often eliminate the need to make a weakening defensive pawn move.

**ANTICIPATION:** The defender should try to anticipate an attack in advance. The player with an advantage has more flexibility and can usually conceive his plan of attack on the fly, but **the defender has to be able to predict the imminent attack well ahead of the offensive.**

**CHOICES:** One possible strategy of defense is to offer the attacker several choices. Not only is there a chance of confusing him, but he will consume more time on the clock. If your position is worse, it is important to **try to confuse the opponent with a complicated choice.**

**IMPROVEMENT:** Sometimes, you can make a defensive position better by finding your worst piece and trading it off or trying to improve its position. For example, maybe you can exchange a bad bishop that cannot be made better.

**DEVELOPMENT:** Development is important in defense. It is usually more important than grabbing pawns, for example. “Just as effective development is required for a successful attack, it is equally essential for a successful defense” (Fred Reinfeld, *A New Approach to Chess Mastery*).

**OPEN LINES:** “If your king is still uncastled, avoid opening the center, giving your opponent some access to your fettered monarch” (Bruce Pandolfini, *Chess Openings: Traps and Zaps*). **If your opponent is ahead in development, do not open any new files. Do not relinquish control of an open file. Try to contest it.** If unable to contest it, try to block or lessen the consequences of an attacker’s open lines. Closing the position with a blocked pawn structure reduces the possibilities for the attacker; as a result, it is usually a good defensive strategy for the weaker side.

**PROTECTION:** Defend immediate temporary threats with durable, long-lasting moves. Keep your pieces on protected squares. Even before an attack, it is generally a good idea to keep at least one piece near the king for protection. A typical example would be keeping a knight at f3 when castled kingside. Do not forget to consider attacking the attacker’s reinforcement pieces as well as his front line pieces.

**EXCHANGES:** Exchanges can take the steam out of an attack. The exchange of queens can be the remedy against many attacks.

**COMPLICATIONS:** If you are defending a difficult position, **consider even the most unlikely ideas. Complications are good for the side that is losing.** It is easier for your opponent to handle the typical simple position. The chances for him to make a mistake go way up if the position is complicated and unbalanced. Therefore, if you are defending a bad position, it can be a good idea to complicate matters; fearlessly change the character of the game, and

counterattack. Be sure that your position is bad enough though, because if your position is only slightly worse, it usually pays to try to re-establish the equilibrium.

**CASTLE ON OPPOSITE SIDES:** If your opponent wins a little material in the opening, castling on opposite sides becomes a potential defensive strategy. By castling on opposite sides, you might have a better chance, because what matters then is who gets there first and how much material is involved in the individual attacks (not how much material is on the board).

**STALEMATE:** Sometimes, if you are in a poor or lost position, a stalemate can be a way to save half a point. To obtain a position in which you can force a stalemate, it is necessary that the stronger side has completely overlooked the possibility. It takes a fighting attitude and creativity to find a stalemate. Along with those attributes, a familiarity with some stalemate themes helps a lot as well. **Finding stalemates is a little easier if you figure out what piece on what square would remove your last available flight square.**

## ***DEFENDING A LOST POSITION***

**ACTIVITY:** Activity is so important in lost positions that it is usually better to be a full piece behind and active, than to be a pawn down and passive. Any activity is better than no activity. An exchange sacrifice is worth getting some activity if you are in a passive and lost position.

**COMPLICATE:** When you have a lost game, set difficult problems for your opponent. Try to base the complications on the positive aspects of your game, if any. You can disregard general principles and attempt to disrupt your opponent's plan. Try to confuse your opponent. Play moves with hard to find refutations. It is during times that you want to increase the element of chance. "If our position is hopeless, our only chance may be deliberately complicating, or even making simple one-move threats hoping the opponent will overlook something. We have nothing to lose by such tactics" (John Greco, *The Chess*



*Tactician's Handbook*).

**CHANCES:** No matter how bad the position is, there are always chances that a little finesse here or there could restore the balance. **You can find practical chances in even the most hopeless positions.** “I always remember jonathan Rowson’s advice when you are playing a lost position—that **no matter how bad the position is (within reason of course) there is always something positive about it**” (Jovanka Houska, *Chess*, May 2009).

**INITIATIVE:** Try to get the initiative. **With the initiative, miracles can happen.** Get the initiative even if you have to give up material for it. If you can get your opponent to defend, the psychological affect can swing the game back in your favor.

**TENACITY:** If you are in a lost position, do not fling pieces and hope that something works (with the idea that you will resign if it does not), and do not play quickly, thinking that you have nothing to lose (playing fast in a losing position is suicidal). Instead, hang tough and keep fighting. Try to find the best move. Do not let your position worsen. Play a move that you would not like to face if you were the opponent. **Players make their worst moves in totally won or lost positions.** Make your opponent work hard for the win. He might get even get annoyed or suffer some other psychological reaction (such as laziness, aggravation, or discouragement) and blow the game.

**ASSAULT:** **At some point** (for example, when you are about two or more pawns down), **you have little to lose by, almost recklessly, throwing all of your material at the opponent’s king.** This is especially true against strong opposition (where the likelihood of mistakes is low and passive defense is futile). Look for the best chance of winning (or drawing) and go for it. It is better than losing slowly-but-surely.

**STALEMATE:** Stalemate or draws by repetition are perfectly legitimate defenses, which you should not overlook. When in a lost position, look for those possibilities.

**MATERIAL:** If you have a bad position, and there is nothing more constructive to do, gaining material might be effective. It might not only help relieve the pressure, but might give you an advantage later on if you survive the onslaught.

## ***POSITIONAL CONSIDERATIONS OF DEFENSE***

**SOUNDNESS:** If your opponent's attack has insufficient positional justification, it must fail against accurate defense.

**CONCESSIONS:** In an inferior position, it is usually necessary to make some concessions to prevent various threats. Although **do not make positional concessions** unless there is no other way. **Wait for your opponent to force a weakness; do not allow one willingly.**

**ADVANTAGES:** Important positional advantages, such as structural ones, grow in importance as the game goes on. Understand, clearly, what your advantages and disadvantages are. Knowing this is as valuable for the defender as it is for the attacker. You might have a useable advantage, or a disadvantage exists in your opponent's position that allows for a counterattack. It is easy to overlook such possibilities when you are on the defense. Extreme measures are sometimes needed to overturn a serious positional advantage. **You can take big risks when you have nothing to lose.**

To defend successfully, you have to be aware that you are in some trouble and why. You must also know your weaknesses and strengths so you will know what to do.

**CLOSED LINES:** Do not open the position when you are behind in development or under attack. Close all lines, and keep them closed, when defending your king.

**SIMPLICITY:** If you have choices as to ways of getting out of a predicament, take the simplest one. Do not go in for complications when holding your ground will suffice.

**RESISTANCE:** make it difficult for your opponent to win. Do not simplify into a lost endgame. Avoid moves that give the opponent a clear and easy technical win. In these cases, **if you are not sure whether you can defend or not, choose a move that at least offers some hope (over a certain loser), even if its outcome is not clear to you.** If the objectively best move suggested by general principles leads to a clear and simple loss, it is more practical to choose an antipositional move that, even though it is inferior, holds some possibilities of error on the opponent's part.

**PAWNS:** It is usually a mistake to move a pawn on the side where your opponent is attacking. As a result, it is usually a good idea not to move the pawns until the attacker makes his objectives clear (so you do not create a weakness in the path of his attack).

**DEFENDING WEAKNESSES:** If your weakness is static and serious, you have to act quickly. If your weakness is static but not so easy to take advantage of, you might be able to employ slower methods. If your weakness is a material disadvantage and it looks like your opponent can simplify into a won endgame, then you need to find counter measures. However, if simplification looks difficult to force or you can build a fortress, you can use a waiting strategy.

## ***LUFT***

When there are enemy rooks or queens on the board, especially when open files exist in the center or on the other wing, it is often a good idea to create a luft for the king to help prevent back-rank mates. **Usually, the best pawn to move for this purpose is the h-pawn** because it causes fewer weaknesses than does moving the g- or f-pawns. **Moving the h-pawn does not create a hole.** Moving either the f- or g-pawns weakens two squares, whereas moving the h-pawn only weakens one. **If the opponent still has a king's bishop ready to attack the king-side, though, the move h3 would create a**

target. In which case, g3 is preferred. It is safer to play g3 if the opponent's queen bishop and knights are off. The move f3 can be good when you are in (or close to) an endgame because it can facilitate the king's march to the center.

## ***DEFENSIVE EXCHANGES***

In difficult positions, it is often good to simplify as much as possible. Exchanging material often helps the defender to relieve pressure.

If you cannot defend an attack any other way, exchanging and liquidating into an endgame can sometimes be the best remedy. Besides, exchanging might disorient the attacker, who might persist with the attacking mentality when it would be better, instead, to shift gears. This delay in attitude adjustment can be beneficial for you. Accordingly, **the threat to exchange can be strong**. For example, the attacker (who generally wants to avoid exchanges) might make an inferior move to avoid the exchange.

**PAWNS:** When you are on the defense, you should try to trade off the pawns on one side of the board so you have a smaller area to defend. Fewer targets make the defensive task easier.

**PRESSURE:** Exchanging pieces and pawns is a strong defensive resource. Removing attacking pawns and pieces removes some of the pressure from the defender's weaknesses.

When there is positional pressure over a full area of the board, it is usually a good idea to exchange the major pieces. Be sure not to exchange your active pieces for his passive ones or allow him to get the initiative.

**SAFETY:** Material is needed to create attacking positions. That is why trading pieces is usually good for the defender. Sometimes, exchanges can eliminate all of the attacking pieces. One of the basic tenets of good defense is to **eliminate as many attacking pieces as possible**. With fewer pieces, it is harder to rally an attack. Exchange pieces that threaten your king. Exchange

key attacking pieces. Sometimes, one exchange can erase all of the dangers of a position.

**BETTER PROSPECTS:** Exchanging the strongest attacking pieces can expose the attacker's own weaknesses. For example, some openings are based on the activity of certain pieces. If those pieces are removed, the remaining pawn structure might be weak and the attacker's position uncoordinated.

This does not mean that the solution to defense is to exchange every piece you can. Sometimes, exchanges give the attacker even more control. You have to weigh the possibilities.

## ***MATERIAL IN DEFENSE***

Move order and material are more important in defensive calculations than they are in most other situations. **Both the sequence of moves and the amount of force take on roles that are more vital.** In general, try to trade off your opponent's most active pieces. **As long as the material is equal, there is usually a way to maintain the balance.** If you are defending, and you have a material advantage, you can try for counterplay; or you can try to exchange pieces to lessen the pressure.

**Be sure that the side of the board that your king is on does not become populated by more of your opponent's pieces than your own.** Fewer of your opponent's pieces in the vicinity helps cut down on possible tactics against you. Moreover, by having enough material in close proximity, you can defend against some sacrifices that might otherwise succeed.

**If you are about to lose some material, but you have choices, try to lose material so that you end up with an imbalance instead of having the same kind material as your opponent.** The imbalance is better for the defender. For example, favor losing the exchange over losing two pawns.

When the attacker makes a "quiet" sacrifice (leaving an attacked piece

where it can be taken, or making a sacrifice involving neither a check nor a capture), one important defensive possibility is to make a quiet move in reply, leaving the threat hanging over the piece. If the piece later meekly moves away to a square no better than that from which it started, the defender has gained time. (Colin Crouch, *How to Defend in Chess*)

**ROOKS:** Sometimes, when you are on the defensive, you have a choice between retaining the pair of rooks or being down the exchange and having one rook. If you have a precarious back rank, it is better to keep the two rooks.

**QUEENS:** One defensive technique is to **try to trade queens**. If you trade queens, it will usually take a lot of pressure off the opponent's attack. The queen, being the strongest piece, is involved in more checkmating operations than any other piece. The most dangerous piece in a mating attack is, of course, the queen. **With an exposed king, or if you are under a mating attack, exchanging queens can be the most effective move you can make. If your king is exposed, it can be worth at least a pawn to get the queens exchanged.** When you are threatened with a kingside attack, unless you exchange queens, it is usually a mistake to remove your queen from the vicinity of the attack.

**PIECES:** Be extra careful if you are short of pieces on your castled side. Try to bring your pieces near the king for defensive purposes. At the same time, try to impede the movement of your opponent's pieces to the same area. "For defending the king, use as few pieces as can do the job (so that the others are free for attacking functions elsewhere)" (Edmar Mednis, *King In The Middlegame*).

**MAJOR PIECES:** The major pieces are good for attacking because of their long-range powers, but for defense, they are not quite as effective.

## ***CRAMPED POSITIONS***

If you have a cramped position, exchanging some pieces can give you a little freedom for your remaining pieces. Even if the position is not that cramped, exchanging a few pieces is generally good for the defender. The exchanges help to avoid getting your pieces in each other's way and you will be more able to seize the initiative if the opportunity presents itself. **If you do not know which pieces to exchange, exchange the opponent's piece that controls the most space.**

It is difficult to find correct moves over-the-board in cramped positions, even if the positions are theoretically solid. **Opening the position is usually a mistake for the defender**, but after relieving the pressure of the attack and getting some improvement for your own pieces, it can be possible to free your position with some space-gaining opening of lines.

## ***CENTER IN DEFENSE***

Control of the center is important for the defender because it helps prevent the opponent from coordinating his pieces for operations on both sides of the board at the same time. Centrally placed pieces are not only good for attacking purposes, but for defense as well.

If an attacker has the majority of his power concentrated on one wing, he cannot be as powerful on the other wing. As a result, if you can use the center to breakthrough to the other side, you can launch a counterattack where the opponent is weaker.

**The strongest counter to a wing attack is a line opening in the center.** This is usually accomplished by a pawn advance to contest control of the center or to remove an obstacle to your counterattack in the center. This central thrust is only effective after the attacker has committed his forces for the attack. The timing of the push is crucial. If an attack is unsound, a counter blow in the center will usually break the attack with decisive effect.

## ***DEFENDING AGAINST STEAMROLLER***

The standard defense to a steamroller (2 mobile center pawns) is to entice the advance of one of the pawns so you can blockade the other.

## ***DEFENDING AGAINST PAWN STORM***

In the face of a pawn storm, it is a good idea to get your pieces out of the way of the oncoming pawns. Then, the attacking pawns will only have the opposing pawns as targets and they will not be able to gain any tempos along the way.

It is well known that **you should not move pawns on your weaker side**. This is especially true if you are facing a pawn storm against your castled king. Any movement of the any of the pawns in the pawn shield could cause a weak spot and allow a breakthrough. An exception might be a timely pawn move to close the structure. Make such a move carefully because the game would probably hinge on whether it stops the attack or leaves a critical opening.

## ***COUNTERATTACK***

**DECISIVE:** When an attack has been repulsed, the counterattack is usually decisive. Often, pieces that are positioned for attack are poorly suited for defense. Consequently, when you do counterattack, it often leads to a win.

**BEST:** Counterattack is the best form of defense, especially when you have a queen versus other pieces. Counterattack is usually the best defense (**the best defense is a good offense**). Prepare counterplay at every opportunity. If nothing else, it will distract your opponent from his plans. **Try to consider your own plans with every defensive move you make. If your pieces are in good positions for defending your weaknesses, they are probably not placed well for offensive purposes.** Eventually, your opponent will be able to



take advantage of the situation. Counterplay is the best defense. Use it, even if it means neglecting king safety, material or positional concerns.

Active defense is the almost universally accepted method of defense today. If you choose active defense, do not do it half-heartedly and do not stop half way. No matter how serious your opponent's attack seems, always see if there is a counterattack before defending. Another reason for choosing a counterattack is that passive defense requires great skill to conduct successfully.

**PSYCHOLOGICAL:** If you counterattack at the right time, it can take a big psychological toll on your opponent. The attacker will have used up many of his resources, maybe even sacrificed some material, and his pieces will be out of play for defending. He will be at a psychological low and might be ready for the taking. **The moment the attacker becomes the defender is often the decisive moment of the game.**

**AS A STRATEGY:** Counterattack is not only the best way to defend; it can be a strong way to play the game in general. Judit Polgar was quoted in Sergei Soloviov's book, *Super Tournaments 2003*:

I used to try to play beautifully and was my trademark: sacrifices, attacks and plenty of risk. I have gotten wiser now and I present the opportunity to take risks to men. **It is more fruitful to counterattack than to attack with risky sacrifices.** (Judit Polgar, *Super Tournaments 2003*, Sergei Soloviov)

**PIECES:** Forcing an attacker to retreat one of his most valuable pieces is a good way to start a counterattack. Because, then, the counterattacker is effectively up a piece for the counterattack. This can make the counterattack overwhelming. "Nothing is more ominous for an attacker than the compulsory retreat of his most powerful unit; for then the counterattack, undertaken with an extra piece, usually becomes irresistible" (Rudolf Spielmann, *The Art of*

*Sacrifice in Chess*).

**TIPS:** Initiating active play in the area that the attacker is disregarding is often a valuable defensive idea. Counterattacks must be as good as or better than the attacker's threats and require accurate calculation and timing. A counterattack is not usually a good option if your own king is more vulnerable than your opponent's is or if the attack is in the center.

## ***DEFENDING THREATS***

**IGNORE:** When an opponent attacks one of your pawns or pieces or threatens some action, it is normal to think automatically about moving or defending the piece or pawn or trying to prevent the opponent's plan. Instead, **first look for a way to ignore the threat.** Maybe there is something better.

**Do not weaken your defenses voluntarily.** For example, making moves like h3 to prevent a knight or bishop from occupying the g4 square not only costs a tempo, but also it weakens the pawn structure. Another example is playing g3 to dislodge a knight at f4. The knight's position is probably not as dangerous as the weakening of the pawn structure.

**LONG-TERM:** Try to meet short-term threats with long-term moves. In other words, consider the long-range plan with each move and try to solve the immediate threat with a move that also promotes your long-range objectives.

**EACH MOVE:** On each move, look to see if any direct threats exist and, if they do, how to handle them. **Ask yourself after every move your opponent makes, "What is the threat?"** Find the threat, and then decide what to do about it.

**MEET:** The first rule of defense is to meet direct threats. Active defense is not always possible; sometimes, you have to defend what is attacked.

## ***DEFENSIVE DEMEANOR***

**CALM:** Keep calm when being attacked. Panicking will only make it more difficult think clearly. Being able to remain composed (while looking for counter-chances) is a big asset. **If you are able to stay cool and collected, your opponent, who has the burden of proof on his shoulders, is more liable to make a mistake.** He might think the game is in the bag and let down his guard. “The best thing you can do when being furiously attacked is to remain calm. I put on my ‘Petrosian’ hat. You’d be surprised how creating a state of mind related to a player can help” (Tim Hanks, *Rank & File*). By remaining calm and alert, you will be ready to capitalize on your opponent’s mistakes. “Like no other aspect of the battle, defending demands of a player coolness, composure, and the ability to avoid panic” (Lev Polugayevsky, *Grandmaster Performance*).

**TENACITY:** Do not give up hope. Many won positions have been lost in the past by all levels of players. Fight to avoid the loss, even if there is only a slight chance; anything can happen. Work hard and apply yourself to the current defensive task. **A few tenacious** defensive moves can demoralize an attacker who thought he had an easy victory. **Never give up.** Good defense requires a strong will and good nerves.

**MISTAKES:** **It takes more than one mistake to lose the game.** If you have a bad position, it is not lost unless you make more mistakes. Your opponent has the burden of making a win out of a game in which he only has the advantage. Therefore, he has pressure, too. Do not lash out and attack without regard for the positional requirements of the position. Your opponent (the attacker) wants to avoid complications and unclear combinations. He wants a simple win without making more sacrifices. So, do not allow him a simple, forced win. If you can keep alive long enough, the chances are good that he will make a mistake. Causing a sudden transformation of the game’s character can provoke a mistake from him.

**OVERCONFIDENCE:** If your opponent has a strong attack going, he will

often relax, lower his attention, and begin making mistakes. If you are alert and spot these mistakes, you can reverse the trend.

**RISKS:** It is as necessary in defense as it is in attack to be willing to take risks.

**ATTITUDE:** Many players get demoralized as soon as the tide turns against them. It is important to have a good attitude if you hope to defend well. **You have to be able to switch from offense to defense as soon as you get an inferior position. You have to make that switch psychologically, as well.** The attitude must be defensive, but you should always look for the positives. “Good defense is a matter of attitude as much as anything else. Some players are defeated the minute they lose the initiative; they are discouraged when they can no longer attack” (Andrew Soltis, *The Art of Defense*).

**If you have a solid position, remember that an attack cannot succeed against you if you defend well.** Have confidence in yourself and your position and play good defensive moves.

**CONCENTRATION:** You need to concentrate on the situation at hand; **do not be bemoaning the fact that you have an inferior position.** If you are distracted, or not fully focused on the game, you might miss the saving move when it appears.

**OVER-ESTIMATION:** Do not over-estimate or fear your opponent’s attack. Keep your composure and play well.

# POSITIONAL

*Positional play is a means to an end—effective tactics.*

—Ron Curry, *Win At Chess*

## **POSITIONAL PLAY**

Positional play is the way we play when we are not calculating. Positional play consists of improving your position when there are no advantageous combinations available for either side and no attack is in progress. It means the gradual improvement of your position and the avoidance of risk. It is a matter of provoking weaknesses in your opponent's game while not creating any of your own.

**Positional play is about how to get a better position** (not only a better position, but also one we know how to play). “In order to play at our best, we have to get into positions that we can play well!” (Andrew Martin, *Chess*, October 2006). “In purely practical terms, it is better for a player to have an inferior position in which he understands what to do than to enjoy a better game without a clue of where to move next” (Lev Alburt & Roman Pelts, *Comprehensive Chess Course*, Vol. 2). “Experience teaches us that the player who understands the position best, has the greatest chance to end up the winner” (Herman Grooten, *Chess Strategy for Club Players*).

Positional play requires different skills, specifically the assessment of the situation on the board and the formulation of a correct strategy based on that assessment. It is based on clear thinking and logic. The long-term aspects of the position (for example, the pawn structure) become the focus of attention and the strategy becomes more pressing than calculation.

There are many positions, and sometimes even complete games, where positional understanding overshadows calculation. **A lot of positional**

**knowledge is based on general principles and a lot of it is from experience** with typical patterns and positions.

The player that understands positional play is less likely to start premature attacks or play risky and unjustified moves. He is less likely to look for tactics when they are not likely to exist in the position.

Some of the most brilliant games in chess have arisen out of the quiet lines, where the battle is postponed until the opening is over. You don't need to force the issue if the position doesn't have a dynamic character.  
(Eric Schiller, *Gambit Opening Repertoire for Black*)

The player that understands positional play knows where his pieces have the best potential and how to control important squares, gain space, and weaken his opponent's position. He aims for getting an advantage while maintaining safety. **The positional knowledge of a player is an indication of his overall talent and his chess maturity.**

**PREPARE TACTICS:** Except for mistakes by your opponent, decisive tactics do not just appear. They are not the product of the brilliance of the player. They are created by sound positional play. **A superior position is the foundation for good tactics.** The strong player does not have to search for tactics. He creates the proper conditions and the tactics appear automatically. "There is often more than one way to win after a positional superiority has been established" (Irving Chernev, *Logical Chess, Move by Move*).

**ACCUMULATION:** The job for the positional player is to accumulate, steadily, small positional advantages and to convert temporary advantages into permanent ones. **Several small advantages can add up to a won game.** This is what Steinitz called the "accumulation theory."

The secret of winning chess lies in accumulating small advantages until they mount to steamroller proportions, when your opponent may see the

crusher coming but be unable to get out from under. **Positional play consists in strengthening your position in small ways when no direct combination is possible.** (Larry Evans, *Chess Questions Answered*)

**CALCULATION:** Your calculation ability will be better if you have a strong positional understanding.

Being able to grasp the ideas of a position in fact means that you will be much more efficient in calculating your lines. Because some lines you will simply not need to calculate because you will know that this or that move is simply positionally strategically wrong and simply doesn't have to come into consideration. Thus you will save time, avoid time trouble, and will be a stronger and more efficient at the chess board. (Rustam Kasimdzhanov, *Strategy Step by Step*, Fritztrainer)

## **OPEN FILES**

**REMOTE:** If there is more than one, **the most distant open file from the king is probably the most valuable.** Opening files near the opponent's king is not always possible, or even desirable, but the same purpose (occupying the seventh rank) can be served by opening a remote file instead. "Of several open files the remote open file is likely to be the most useful" (David Hooper, *Practical Chess Endgames*).

**If your opponent tries to open a file on the flank, your best response is to open a central file.** If this is not possible or beneficial, opening one on the opposite flank can be good.

**CENTRAL:** If there are open files in the center, it is usually not good to decentralize your forces. Keep your forces centralized.

**WHY:** The reason for occupying and controlling an open file is generally to get your rooks out from behind the pawns so they can exert their power.

Specifically, the goal is to penetrate into the opponent's position and gain access to, and occupy, the seventh or eighth rank with a rook. From there they can attack weak pawns and set up a mating attack. Opening a file for your rooks is especially important if you and your opponent have castled on opposite sides.

**If there is only one open file, it is usually advantageous to control it. It is a big positional plus, often they are the most important feature in the position and they can easily decide the game. The first player in an open position to control an open central file will generally get the initiative. It is usually wrong to remove a piece from an open file to avoid exchanges.**

**TWO FILES:** If you have two open files, put one rook on each file or double your rooks on the same file.

**THREE FILES:** If there are three open files available, put your rooks where they are most flexible (have the most options). The same is true if you have any number of open files or a combination of open and semi-open files.

**OPENING FILE:** Open, or semi-open, files are often created by the doubling of pawns. This is one of the reasons that doubled pawns are not always bad. **Opening any line (files included) is advantageous to the stronger side. If you are the stronger side, open the lines where you are the strongest. If your position is inferior, or you think your opponent will take it away from you, you should not open up a file. You should open the file only when you are ready to take possession of it, not before.** Opening a file is an important event. Be sure that you will benefit from it, not your opponent.

Before making the exchange, which will open a file, it is always wise to ask what advantage this will give us. If none, then it is better to put off the exchange until further preparations have been made. The simplest way is to begin by doubling the rooks. Other possibilities are the occupation of a



support-point on the file, which is to be opened, or the driving away of the enemy rooks by a knight or bishop. Or, in more complex style, one might engineer a diversion in another sector, forcing the enemy to fight on two fronts simultaneously. (Max Euwe & Hans Kramer, *The Middle Game*)

**CONTROL: The occupation of an open file does not (alone) confer an advantage. It is controlling the file that does.** If you do not actually control the file, it is likely that your opponent will exchange off all of the major pieces on the file. That is, in fact, the usual outcome when there is only one open file and you do not control it. The only alternative, usually, is to let your opponent have control of the file. Of course, that is not good. **Never surrender an open file.** You do not want the enemy rooks getting into your position. **The only time that letting your opponent get control of an open file is not disastrous is when there is no chance of him penetrating into your position.**

To gain control of an open file, get control of its back square. **Rooks belong on open files.** Double-up your major pieces on the file. To successfully control a file, there must be a square (usually on the seventh or eighth rank) on which you can enter the enemy position. If the square is on the sixth rank, it should not be defensible by an enemy pawn. If this support-point is defended by enemy pieces, remove them by exchanging or driving them away; otherwise, the value of the open file is significantly reduced. This is why, **to gain control of an open file, you usually have to have the superior minor pieces.**

**If you have a queen and a rook doubled on an open file in a mating attack, especially the a- or h-file, it is usually best to have the rook (or rooks) in front of the queen.** This is because you can use the queen, with its added diagonal ability, to cover the king's flight squares. Furthermore, the rook in the front makes it easier to harass the opponent's pieces.

## ***SEMI-OPEN FILES***

**TECHNIQUE:** The difference between an open file and a semi-open (half-open) file is significant. The way to play with the semi-open file is to force the file open when it is to your advantage, or to divert the enemy pieces to the defense of the pawn while you start a decisive attack. Usually, this is done by occupying the file with one or both rooks and then attacking the pawn with your own pawns to force its exchange. The desired result is control over an open file. A minority attack is also sometimes possible.

The value of a semi-open file is increased when the opponent's pawn is backward. The technique for taking advantage of a semi-open file, if the opponent's pawn is backward, is to put pressure on the pawn and force the opponent to defend it. Try to gain the initiative by way of the semi-open file and try to open the file to your advantage.

**ROOKS:** As with open files, rooks belong on semi-open files. The pawn on the file becomes the object of attack for the rook or rooks.

There is no contesting the file, as with open files. The only way would be if the opponent's rook got in front of the pawn, which is a rare situation.

**CONTROL:** A semi-open file is usually more beneficial to control than an open file because the opponent cannot challenge the file with an opposing rook.

## ***DIAGONALS***

Most of what has been said about open files applies to open diagonals as well. All of what has been said about open lines applies, of course, because the term "open lines" includes diagonals. There are some differences and some exceptions, however.

The diagonals are the lanes for bishops (and queens) and because bishops are rarely the result of a promotion (let alone twice in the same game), tripling

on a diagonal is almost never heard of (whereas tripling on a file is relatively common). Another difference is the way pawns affect diagonals as opposed to the way they affect ranks or files.

The queen, rook and bishop are long-range pieces. They need open lines to be optimally effective. The knight, king and pawns are shorter-range pieces and are less cramped by closed lines.

**Tactics play a larger part when dealing with diagonal than with files. Files are usually more the subject of positional concerns. The reason for this is mostly that the rooks are strong enough to be a threat on their own, whereas bishops usually need some help.** “If one side wants to open the long diagonal, the other side should clearly try to keep it blocked” (Roman Dzindzichashvili, *Roman’s Lab*, Vol. 2, DVD).

Diagonals are important elements of complex positions. There are many examples of a diagonal being the decisive factor in a game. “Three diagonals, one for the Queen and two for the Bishops, are worth a pawn” (John Collins, *Maxims of Chess*).

## **RANKS**

When we speak of “open lines,” ranks are usually meant to be included, but much less so than files and diagonals. The importance of ranks is usually less than that of files and diagonals as well.

Rooks like open ranks almost as much as they like open files. **Doubling rooks on the seventh rank, for example, is usually positionally strong.**

## **PIECE PROTECTION**

Grandmasters automatically put their pieces where they protect each other. Unless you calculate all of the possibilities, it is a good idea to do the same. Avoid “loose pieces.” Unguarded or insufficiently guarded pieces (and

pawns) are potential targets. This applies especially to pieces on the edge of the board.

Do not leave a piece in the position where it ties down another piece to its defense. **Generally, you should move a piece that is threatened with capture, as opposed to protecting it with another piece.** By doing so, the protecting piece is hindered and this situation can set up tactics for your opponent.

## ***IMPROVING POSITION***

Any time you have the opportunity; you should improve your position, or make your opponent's position worse, if even a little. It is not necessary to have an exact plan or tactic in mind; it is the idea of strengthening your position relative to your opponent's that counts.

Initiating an unjustified attack on your opponent will usually be ineffective and no checkmate will reveal itself. On the other hand, when you gradually build up the position with a series of small improvements, the mate will often present itself.

Small improvements are especially important when the game is level. If you are far ahead in material, small improvements often do not matter as much. **If your opponent cannot improve his position, look for a waiting move** to allow your opponent a move to weaken his position or consider immediate action to exploit your advantage. If the position is essentially even, and neither player has any direct threats or obvious plans, improve the position of your worst piece (by moving it to a better square or by exchanging it).

Do not miss a chance to improve your position or to make your opponent's position worse. Even almost imperceptible improvements can add up. When no attack is possible, find better squares for your pieces, improve your pawn structure, deactivate your opponent's position, and more or less wait for

opportunities to arise. “One of the golden rules of chess strategy is: if you have a piece on a good square, find an even better square for it!” (Neil McDonald, *Chess: The Art of Logical Thinking*).

One way to improve your piece placement is to try to improve the placement of your worst placed piece. Look for a piece that is doing something that another piece is doing. **Often, you can move a redundant piece to a better, more useful, location.**

## ***SHARP POSITIONS***

In sharp positions, it is not good to tie yourself down to the defense of weak pawns. Exchange them for some kind of compensation, such as the initiative. **In sharp positions, there is usually only one correct way to proceed.** Igor Zaitsev was quoted in *Attack and Defense* (by Mark Dvoretsky & Artur Yusupov) as saying: “Many years of experience in chess analysis have convinced me that in tense positions balanced on a knife-edge, there cannot be two paths to victory.”

## ***PIECE PLACEMENT***

*If one piece stands badly, the whole game stands badly.*

**—Tarrasch**

Tarrasch’s observation can be useful, not only to help you to avoid putting your pieces on bad squares, but also as a guide to spoiling your opponent’s position. If you can compel your opponent to place one of his pieces poorly, his whole game will stand badly as a result. On the other hand, when your pieces are well placed and coordinated, tactical opportunities will surface.

**“pieces belong behind pawns”** (Philidor). Pieces in front of pawns obstruct the pawn’s mobility. Pieces behind pawns may seem to lose some

capacity because their range is limited, but they still have power and they add a lot to the potency of the advancing pawns.

When considering piece-placement, it is important to consider the scope of the other pieces. You should not place a piece where it obstructs any of the other pieces. **The number of squares a piece controls is not as important as the number of important squares it controls.**

Try not to place an advanced piece where it has no retreat. Do not put your pieces where they feel awkward. **If the placement looks awkward, it probably is.** It might even be better to sacrifice it or something else, in order to avoid the awkwardness. Unless there is a concrete reason to the contrary, usually tactical, **it is usually best to put your pieces on their most natural and active squares.** “A knight on b3 (b6) is always bad” (Tarrasch).

If a piece is doing something useful it, usually, cannot be bad. If a piece is not a working piece (for example, it is undeveloped, out of play, passive, or blocked by pawns), it is not a good piece.

If there is no reason to the contrary, you should occupy squares that prevent the opponent from intruding into your position. If this is not possible (and you have nothing else constructive to do), at least, try to foil your opponent’s plans.

## ***ADVANTAGES/DISADVANTAGES***

**IMPORTANCE:** To win, it is usually necessary to have several small positional advantages, but sometimes one is enough. Having positional advantages can give you better winning chances and more options for transforming those advantages into material, an attack, or other concrete or dynamic rewards.

**MAINTAIN:** When you have the advantage, try to maintain it. If you have the advantage, a move must be possible that preserves it.

**INCREASE:** When you have the advantage, try to increase it (but not at the

risk of losing it). In order to increase your advantages, you must play with a purpose. Advantages do not increase by themselves.

### TYPES:

Material advantages: A material advantage can be a matter of being up one or more piece. It can also be the advantage of the exchange, or having the good bishop vs. bad. **Material advantages are usually the most decisive kind. If you have a material advantage, look for a way to convert it to a win without taking unnecessary risks.** “There is no doubt that an advantage in material, be it only that of a pawn, justifies far more audacious measures, both in attack and defense, than would be permissible in a perfectly even position” (Edward Lasker, *Modern Chess Strategy*).

Material advantages tend to be more long lasting and useful than most other kinds of advantages. Yet, rather than submitting to a serious positional disadvantage, it is usually better to give up material. Converting a material advantage into a positional one is usually the best approach anyway. Besides, positional advantages are easier to play.

Temporary advantages: Temporary advantages (such as those from an advantage in development, mobility or tempo) tend to be short-lived. Because they do not last, exploit temporary advantages at once or convert them to other kinds of advantages. **“A temporary advantage must be exploited at once, or transformed into something more tangible, else it disappears”** (Bruce Pandolfini, *Chess Thinking*).

Permanent advantages: Permanent advantages (such as material pluses, bad king position, control of a diagonal or file, control of a rank, the bishop pair, or various kinds of pawn structures) tend to be more enduring than some other kinds of advantages (such as a lead in development, bad piece placement, centralization, space advantage or the initiative).

Positional advantages: Positional advantages (such as control of open lines,

center control, better pawn structure, and king safety) are constantly changing during the game. The accumulation of small positional advantages is the idea behind positional play. At some point, if you have accumulated enough of these little advantages, your opponent might have to exchange something more permanent (like material or to allow an attack) to counteract these accumulated advantages.

**METHODS:** If you are winning, think more about defense. Think about defense, so you do not lose the advantage, but do not go “on the defense.” Especially if he has gained a material advantage, often a player will play a passive, defensive game, trying to get to an endgame. These kinds of strategies usually lead to failure. Often, the opponent will get the initiative and turn it into a positional advantage, which, in turn, compensates for the lost material. “If you’re better you have to press” (Veselin Topalov, *Chess*, June 2008).

If you are losing, think more about offense. If you have the advantage, focus hard on the game. It is easy to relax, but every move is important and an error can easily lose the advantage. If you have a slight disadvantage, you should play more alertly, creatively and daringly. With this attitude, it is common to see a slight disadvantage change into a firm advantage.

“No move is weak unless proper advantage is taken of it” (Irving Chernev, *Logical Chess, Move by Move*). You must exploit your advantages or they will disappear and your opponent will equalize or even take over. **Play where you have the advantage.** If your opponent has the advantage in one area and you have it in another, play where the advantage is yours. Otherwise, you will probably lose. Try to build your advantages and worsen your opponent’s. Try to take away advanced outposts for his knights. If he has a bad bishop, try to make it worse and yours better.

When you have a long-term advantage, do not rush to use it. An advantage you can exploit at once is a safer option than one that must wait for a substantial transformation in the position (such as a transition into endgame



play).

I made use of the practical piece of advice, which was given to me by Capablanca: “**When you have the advantage and your opponent has a passive piece set-up, one should not hurry matters.** With each move the likelihood of an error from the defending side increases.” (Mikhail Botvinnik, *Botvinnik’s Best Games 1947–1970*)

**ACCUMULATION:** It is much easier to accumulate small advantages over the course of the game than to try to calculate all of the variations every time it is your move. If the accumulation of advantages builds up to something substantial, a decisive strike or combination will materialize.

The desire to take advantage as quickly as possible of a move by your opponent which at first glance seems unnatural, incorrect, may lead you into an attack along a false line. Definite positional advantages are acquired little by little only through gradual development of your forces and extremely circumspect playing, and then the possibility of dealing your opponent a decisive blow will appear. (Mikhail Tchigorin, *The Soviet School of Chess*, Kotov & Yudovich)

These days, it is more difficult to accumulate advantages than it was in the days of Steinitz and Tchigorin. Opponents have gotten wise to these ideas. Nowadays, it is more of a trade-off of advantages that goes on between opponents. One player gives up a little to get a little compensation in return. The other player does the same. The point is that often you cannot just accumulate advantages; you might have to give something away in order to get something else.

**ACQUIRING:** There are two main ways that you can obtain an advantage. One way is by a mistake made by your opponent, whether by material loss, positional error, poor strategical planning, or a succession of slight

inaccuracies. The other way to get an advantage is by active play on your part (usually from having the initiative), or from positional pressure that builds unnoticed by your opponent until too late.

## ***ANALYSIS/EVALUATION***

As was said (in the section on “calculation”), there are a few terms in chess that have the same meaning or are commonly misused. The terms “calculation” and “analysis” are among them. They are frequently used synonymously. Here, the term “analysis,” though, is used to mean the examination and scrutiny of a position. Analysis paves the way for evaluation. It is not the move-by-move (“if he goes here, I’ll go there”) working out of a sequence of moves and the replies to those moves (for which, here, the term “calculation” is used). Analysis involves more judgment and memory than calculation does. As an example, analysis means asking yourself, “What is the best move in this position?” or “Where does the bishop belong?”

It may be splitting hairs, but to add to the confusion, analysis is involved in evaluation, and vice versa. A further ambiguity is that the term “analysis” is often used by some people in reference to “post-mortem analysis.” Consequently, often the usage of these terms is, necessarily, fuzzy. Technically, you analyze first, and then evaluate the position based on that analysis; then, if you are going to calculate, you calculate (repeating the process at the end of each line that you calculate). Nevertheless, often players, coaches, and writers use the terms interchangeably.

Botvinnik has been quoted many times stating pretty much the same theme: **The art of a chess master is, basically, the ability to analyze and evaluate chess positions accurately.** It is clear that Botvinnik had a high opinion of the ability to analyze. **“He who analyzes best will often win, even from lost positions!”** (Tim Harding, *Why You Lose at Chess*).

Masters, in general, often tend to be more fascinated by the analysis of a

game than the actual moves of the game. That is partially because, in the actual game, there are bound to be errors made. You can often find the best moves, the most accurate moves, among the moves that were not played.

The ability to analyze is a good measure of a player's strength. Good analysis is indispensable for playing well. "Every move you make in chess has to be based on one of two components: evaluation and logic, or calculation" (Roman Dzindzichashvili, *Roman's Lab*, Vol. 2, DVD).

**QUANTITATIVE:** The quantitative method of evaluation is simply to count the pieces and pawns. Computers express their evaluations in terms of pawns (for example, a computer evaluation of 3.5 means 3.5 pawns).

**QUALITATIVE:** The qualitative method of evaluation is to consider positional concepts like space, mobility, coordination, and open lines. Qualitative evaluation involves the subjective comparison of dissimilar elements. Its purpose is to answer the question: "who is better?" during a game (as opposed to home analysis or post-mortems), it is necessary to limit your consideration to only those concepts that are relevant to the position. That is the art. The ability to focus on the important factors in a given position and to weigh one element against another (in other words, decide what is more important at the time) is what separates the master from the amateur and the human from the computer.

**LENGTHY ANALYSIS:** A player usually sees more in the first few minutes of assessing a position than they do in successive periods. **Moves that take more than about 20 minutes to determine are usually bad.** There is a saying: **long analysis, wrong analysis.** Too much time spent on analysis leads to fatigue and uncertainty.

**STATIC:** The evaluation of a position best begins with an analysis of its obvious positional characteristics, such as material, pawn structure, open lines, and king safety. This static assessment is made prior to making a dynamic assessment. If both sides have one serious permanent weakness, you have to

look at the other characteristics of the position to make an accurate assessment. **The static assessment is based on the position without considering the movement of the pieces.**

**DYNAMIC:** Dynamic evaluation is done after a static evaluation and is the kind of assessment that considers the movement of the pieces and the changes that are, or could be, taking place in the position. It is done at the end of each line of concrete calculation in order to compare the various lines.

**METHODS:** If, during the game, you imagine the board without any of the pieces (just pawns and kings left on it), you will get a better idea of what an endgame would look like if you exchanged off all of the pieces. It will help you evaluate the value of the bishops (good or bad), find strong outposts, and help you see how you might be able to exploit such features.

When you reach a critical position, where you can steer the game into a win or a draw, you should take special care with your analysis. **After a series of tactics, look for a change in the pawn structure.** If there is one, the position needs to be re-evaluated.

During the game, it helps to split the analysis into two parts. When it is your turn to move, be precise and detailed. Then, when your opponent is thinking about his move, be creative and contemplate the more general aspects of the position.

It is essential to be able to decide which factors are the most important in a position. Usually, no more than two or three factors in a position are significant. To evaluate a position, consider the safety of your king position (and your opponent's), material, piece coordination, the center, pawn structure, and open lines. By looking at the board from the other side, you can sometimes make a fresh assessment of the position.

When you look at a position, first see if there are any immediate dangers. By determining which the strongest threats are, you will discover where the critical conflict is centered. Sometimes, a forced mate exists which, of course,

eliminates the need to analyze other aspects of the position. In an apparently equal position, look to see if there are any pieces hanging.

One quick technique is to count the number of pawn islands for both sides. Consider also the possibility of picking up a pawn or winning the exchange. Then, consider the possibility of gaining space, weakening your opponent's pawn structure, or creating a passed pawn. Some of the first concepts to consider when assessing a position are:

- the position of the kings
- time
- the material on the board
- piece activity
- space
- pawn structure

Strong players will try to recall similar positions to help them analyze the current one. The position might be typical of a standard theme. There might be a tactic or some other piece of helpful information in it. It is rare that the strong player will recall a position exactly like the one in question, but some part of it might be similar enough to be useful.

**OBJECTIVITY:** You must use objectivity when evaluating a position. Winning at chess requires, not only the ability to analyze the position accurately, but to be able to assess objectively the pros and cons for each player in all variations. Without this objectivity, you will choose the wrong move. **The required objectivity is not possible if you are too self-confident or have too little confidence.** Success in chess is reached best by searching for the truth. Look for the best move.

**SKILLS:** The main skills necessary for analysis are objectivity, careful attention to detail, the ability to analyze correctly, the ability to recognize critical positions, and the self-control to do deep analysis when it is called for.

**LEARNING:** To learn how to analyze correctly, you must master the principles, patterns, plans, and common tactical and strategical procedures. The best way to learn these concepts is from actual practice during the game and from post-mortem analysis. During actual games, you can learn from your opponent. Learning from your games is aided by the fact that when you face an idea over the board, you think deeply about it.

## **WEAKNESSES**

Positional play in chess is based on the idea of weaknesses (yours and your opponent's). **Types:** Some examples of positional weaknesses are:

- cramped position
- bad bishop
- open lines directed at your king
- king restriction
- a queen with low mobility
- weak points
- weak color complexes
- pawn structure weaknesses (such as doubled pawns and isolated pawns)

**FINDING:** Recognizing a weakness is the first step towards taking advantage of an opponent's weaknesses. The master knows how to find and exploit weaknesses.

There are always weaknesses in any position. Sometimes, they are almost undetectable, but they are there.

Every move weakens at least one square, even checkmate does (but, fortunately, the opponent will not get a chance to exploit it). After each move, look for the weakness it created. Spot the weakness, and then rally against it.

If you must defend a piece by a more valuable piece, a weakness exists.

Look for this condition.

“The foundation of chess logic is the perception of weak and strong points on the board or projected a few moves from possibility to reality” (Sammy Reshevsky, *Point Count Chess*, I.A. Horowitz & Geoffrey Mott-Smith).

**PROVOKING:** Lure, force or provoke your opponent into creating weaknesses. **If there are not any weaknesses, you have to create them.** Then, you need to try to increase the weaknesses. Usually, the opponent will not go along with what you are trying to do, voluntarily. You have to force it.

**You can force weaknesses in your opponent's position by attacking with pieces or pawns.** An example of provocation is a combined knight and queen attack on the opponent's g7 square (threatening mate). This might provoke the weakness of the move g6. You could possibly provoke the same move by marching your h-pawn to h6.

**Once you create or find weaknesses, you have to attack them.** This forces your opponent to put his pieces in defensive positions. After sufficient pressure is applied, the result will be that his pieces are passively placed; then, favorable tactics will usually appear for you.

**Do not worry too much about creating weaknesses in your own position if those weaknesses make it possible for you to create or maintain a more serious weakness in your opponent's position.**

**EXPLOITING:** Exploit your opponent's weaknesses. Eliminate the defenders of his weak points. Usually, weaknesses are created in the middlegame and exploited in the endgame. You should always be attempting to attack your opponent's weaknesses. **Winning in chess is a matter of exploiting your opponent's weaknesses.**

Keep hammering away at his weaknesses. Force him to defend his pawns with pieces. Exchange the pieces that defend the pawns or other weaknesses. Try to increase the severity of his weaknesses or try to create additional weaknesses in another sector. Eventually, his position will cave in. In order to

protect a weakness, he will usually have to make concessions that result in other problems.

This persistence can also take the pressure off any weaknesses that you might have. If your opponent is constantly distracted and tied down by being pushed around, he will not have time to exploit your weaknesses.

**Do not let the opponent get rid of any of his weaknesses. Freeze his pawn structure weaknesses.** That will make it easier for you to play against them. In the case of a weak pawn, this might mean blockading it with a piece to keep it from advancing (and thereby eliminating the weakness), or by controlling the square in front of the pawn (also to prevent it from advancing).

**EXCHANGES:** One way to exploit a weakness is to exchange the opponent's pieces that defend it. For example, exchanging your bishop for his knight could leave the squares that were defended by the knight weak or vulnerable.

**BAD POSITION:** If you have a bad position, it is important not to create any more weaknesses. You can repair almost any position if you have enough time. On the other hand, creating additional weaknesses will make holding the position much more difficult.

**MATERIAL:** As the number of pieces left on the board decreases, the importance of any weaknesses increases. For example, if you have positional weaknesses, the early trading of queens is frequently not a good idea, because it will reduce your chances for counterplay.

Part of what determines a weakness is the material that is left on the board because **a weakness is only a weakness if it can be exploited.** For instance, a weakness on the opposite color of your opponent's only bishop might not be exploitable with the wrong material or the lack of material. Similarly, if your opponent has both bishops, keep your weaknesses on the opposite color of his strongest bishop. Another example of material determining a weakness is that control of an open file has little value if all of



the pieces are off the board.

**UNFORCED:** Weakening a position unnecessarily is more dangerous than if it was forced, because when it is forced there is opposition and a chance for counterplay. On the other hand, if the weakness is unforced, it is just a weakness without compensation.

Some unforced weaknesses are necessary though. Without creating some weaknesses, we would not be able to maneuver our pieces. In fact, we would not be able to move at all, since every move creates at least one weakened square. **You can usually allow weaknesses in your position in return for good piece activity.**

**ELIMINATE:** Eliminate weaknesses. Sometimes, you can turn weaknesses into strengths. Make every effort to transform weaknesses into strengths. For example, if your opponent has a good bishop and you have a knight that is weak, try to turn the position into one that favors the knight and makes the bishop weak.

## ***TWO WEAKNESSES***

**PRINCIPLE OF TWO WEAKNESSES:** The Principle of Two Weaknesses, a cardinal principle of chess, says that **usually, your opponent needs more than one weakness for you to be able to win the game.** It means that, as in military strategy, usually one weakness in your opponent's position is not enough for you to be able to force a win. You must create a second weakness, a second front, in order to be able to win. Before starting the final assault, provoke a second weakness. This concept is applicable in both the middlegame and the endgame. An advantage of yours (such as a passed pawn, or an active king) counts, here, as a weakness for your opponent.

The lesser-known rule of three weaknesses treats the concept a little differently. The rule of three weaknesses says that one weakness gives the opponent the advantage, two weaknesses gives the opponent a significant

advantage, and three weaknesses gives him a winning advantage.

**WHY:** “The defense of one weakness is a difficult task, that of several is an impossible one” (Max Euwe, *Judgment and Planning in Chess*). Your opponent can often deal with one weakness, but a second weakness extends his ability to defend to an impossible extent by creating too many problems with which to contend. **The defending pieces, being tied to the defense of the first weakness, will usually have problems regrouping and coordinating. They will generally be out of position to handle the additional assault. This is why strong players often do not capitalize on a weakness right away, but instead let them go a little longer while they try to create more problems elsewhere.**

## ***PAWN WEAKNESSES***

**Every pawn move creates a permanent weakness.** The reason is that, after the move, the square or squares that the pawn was previously protecting is left with less protection or no protection at all. Usually, pawn weaknesses become more important in the endgame. Take extra care when making pawn moves since pawns cannot go backwards and the weaknesses created by pawn moves are long-term.

This is not to imply that all pawn moves are bad. Pawn moves are necessary to open lines for the pieces, to seize space, for controlling key squares, and they can even be helpful in the attempt to gain a lead in development. **Pawn moves can be justified if they help solve urgent problems.** Yet, in most cases, these potential benefits from pawn moves are temporary, and if they are not decisive, the long-term weaknesses could prove to be more important.

**KING SHELTER:** The advance of one of the pawns in front of the castled king, particularly the g-pawn or h-pawn, is what usually weakens the king position. This is also the worst place to have pawn weaknesses, because they

create tactical targets. The act of provoking of these moves is usually the prelude to an attack on the king. A weakness on g2 is usually accompanied by weaknesses on f3 and h3 while a weakness on h2 usually only brings with it a single one at g3. Because of this, **the move g3 is usually a more weakening move than the move h3.**

Sometimes, these advances are necessary. Still you should always question whether the weakening is serious, whether you can capitalize on it, and if the compensation is adequate. Often, these pawn advances are weakening if they are made when under attack.

**BURDEN TO PIECES:** A weakness exists when a pawn must be defended by a piece. Weak pawns are a burden to the player who has them (because his pieces become passive defenders).

**EXPLOITING:** Weak pawns are only weak if you can exploit their weaknesses, either by attacking them directly or by controlling the weak squares that they create. **Restrain, blockade, and then finally destroy your opponent's weak pawns.** Remember though, you usually do not need to hurry to capture them (they are a long-term weakness). In fact, **capturing the weak pawn is generally the worst way to take advantage of it, because the opponent no longer has to tie up his pieces to its defense. It is easier and better to create an additional weakness.**

**COMPENSATION:** "A weakening of your own pawns may be accepted only if it is compensated by a more active placement of your pieces" (Vlastimil Hort, *How to Open a Chess Game*). **You can endure pawn weaknesses if they improve the scope of your pieces, solve an urgent tactical or strategical problem, or open lines for an attack.**

These ideas are relatively modern. Steinitz had a relatively static approach to the assessment of pawn weaknesses and weak squares. Nowadays, we believe that pawn weaknesses can even become insignificant if the compensation is in the form of active and harmonious piece placement (the dynamics of the

position). Other forms of compensation might be:

- getting the bishop pair (vs. knight and bishop or two knights)
- getting control of a strong square
- obtaining the initiative
- getting control of the center
- the win of a pawn

However, if the compensation is not sufficient, the doubled pawns or isolated pawns (or whatever pawn weakness was incurred), can easily lead to your defeat. This means that pawn weaknesses are still something for you to reckon with, even though they might be subordinate to the dynamic factors.

## ***WEAK SQUARES/HOLES***

A weak square (from your standpoint) is a square (not necessarily occupied) in your half of the board that your opponent can exploit. A strong square (from your standpoint) can only be attacked by the major pieces (which is why they are strong). This makes pawns and minor pieces safe there (since they can only be attacked by major pieces).

A square that is not defended by a pawn is weak, but, if it is later defended by a pawn, its weakness will have been temporary and usually not significant. The square is potentially weak if you cannot protect it with your pawns. It becomes an actual weakness if an enemy piece threatens to occupy the square and you cannot drive it away or exchange it.

Weak squares are usually caused by the advance of an adjacent pawn. That is why a player often tries to compel such an advance. The ability to create weak squares in your opponent's position for creating an outpost for one of your pieces (usually a knight) is one of the important skills in modern chess. **The closer a weak square is to the center, the more important its**

**occupation is.** It is relatively common for one weak square to become the decisive factor in a game.

Having a weak square is not necessarily a weakness, and not even necessarily important. It may be a potential weakness. **Sometimes, a weak square is extremely important and, at other times, it is not. It depends on the position.** If your opponent cannot exploit it (for example, there are not any pieces to take advantage of it or if it can be protected by a piece), it is not a weakness. In addition, as pieces are exchanged and the endgame approaches, the effect from weak squares decreases in importance.

**A weak square for one player is potentially a strong square for the other.** One of the qualities of a strong square is that it is difficult for the defender to drive a piece away from it or to exchange favorably on it. **To be a strong square it must also be in a significant location near the opponent's position. It is usually more valuable on the king's side than on the opposite side and generally increases in strength as it is located closer to the enemy king.** The final verdict of its strength is based on how it relates to the position and the resulting piece play. A potentially strong square will be useless if there are not any pieces left on the board or it cannot be exploited.

**METHOD: The entrenchment of a knight on an opponent's weak square on his third rank is usually extremely strong. It is often even a decisive positional accomplishment.**

**Gain control of central squares and squares around both kings. If you have good squares, do not retreat from them.**

The aggressive strategy involves also not just controlling and playing on the squares where you are strong but also trying to fight for the squares where your opponent wields pressure. And, if this strategy is successful, at the end you might be controlling the whole board. (Rustam Kasimdzhанov, *Strategy Step by Step*, Fritztrainer)

The problem with weak squares (like with weak pawns) is that they tie pieces down to their passive defense and those pieces are not available to contribute to more productive use elsewhere. These pieces are also subject to being overloaded and not able to meet two simultaneous threats at once. **Opening the position helps to exploit weak squares.**

Every move, whether it is a pawn or a piece move, leaves at least one square less protected than it was before the move. So, you should always check to see if the move left an opportunity for you to take advantage of something.

**Try to get a piece to occupy an opponent's weak square. It is usually worth investing a few moves to get there. If your opponent has two weak squares, try to occupy them both with pieces (particularly knights). This is usually decisive (the principle of two weaknesses).**

**CONTROL:** Before occupying a weak square, be sure to control it by bringing the necessary number of pieces to bear on it. Then, occupy the square when your opponent cannot dislodge or exchange your piece to his advantage. **Usually, minor pieces are better suited for controlling weak squares because they are less valuable than the major pieces.**

**Fianchetto:** If you fianchetto a bishop, you create a hole at h3 (and f3 if you also advance the e-pawn). **The fianchettoed bishop is not as good as a pawn is in guarding holes.** The unmoved g-pawn essentially stops a piece from entering but, with a fianchetto, your opponent can possibly exchange the bishop. All he needs is two pieces to enable one of them to occupy the hole.

**BISHOP:** The bishop is usually the best piece for defending weak squares in a pawnshield. So, **if you are defending the weak squares, do not trade off the bishop of the color of your weak squares. If you are on the attacking side, try to exchange it.** Bishops can be effective when working from a hole in your opponent's position.

**HOLES:** Your pieces are usually more powerful if they are occupying a hole in the enemy camp. Occupy holes in your opponent's position by pieces,

not by pawns. Queens and rooks are not well suited for occupying holes, because your opponent can usually chase them away.

## **COLOR COMPLEXES**

I have long suspected, whenever the books I have read began discussing dark square weaknesses or an attack on the dark squares, that the subject under discussion was not only beyond my understanding, but beyond the author's as well. "Certainly," I would say to myself, "it must be true that the enemy dark squares will be weak if his pawns stand on light squares and he loses his dark square bishop. But if he then removes all of his pieces from the dark squares, what will be left for me to attack?" Such was my line of reasoning, until the day I realized that a weakness of the dark squares is also a weakness of the pieces and pawns on the light squares. Light square weaknesses are also possible, resulting in a weakening of the enemy pieces and pawns on the dark squares. The point of an attack on the dark squares is that, by placing my pawns and pieces on the dark, I attack my opponent's pieces and pawns on the light. (David Bronstein, *Zurich International Chess Tournament 1953*)

One of the points of David Bronstein's famous quote above is that **you cannot consider the white and black squares in isolation when analyzing a position.** The player who controls the white squares can expect to have pressure on the adjoining black squares as a result. The pieces on the black squares can be attacked from the white squares (except by bishops, of course).

**WEAK:** A weak color complex is a long-term weakness and you should usually avoid having one. The weakness is the most pronounced when it is in the neighborhood of the king. The weakness of a color complex can be especially serious if the player with the weakness does not have the bishop of the color of his weakness (as in the case of losing the fianchettoed bishop),

especially if his opponent does. The weakness of a color complex can be so important that it can be decisive.

Whether a color complex is weak, or not, depends to some extent on the location of the material in the position. For example, if white has pawns on a2, b2, d4, e3, g2 and h2, the white squares in the center might become weak. Although, in this case, if black has pawns on d5 and e4 (closing the center), the squares that could become weak are blocked and cannot be occupied by black's pieces. On the other hand, if black could occupy those same squares (d5 and e4) with knights, then the weakness of the white squares would become evident.

Weak color complexes happen when pawn chains are formed, so **you should generally avoid creating pawn chains of one color. If a pawn chain is near the king, it creates an inroad for attack against the king.** At the same time, such an attack is difficult to defend (again, especially if the bishop of that color is missing). A weak color complex is less important when it is located away from the king.

Another form of weakness regarding bishops and weak squares occurs when a player puts his bishop and pawns on the same color (especially in the endgame). Because the bishop is obstructed, it becomes nothing more than a big pawn that (sometimes) can go backwards. This also creates an opposite color weakness because the opposite color is not protected by pawns.

**Color Complex weaknesses are not as important when the minor pieces are gone** (for example, when there are only queens, rooks and pawns left on the board). If the squares cannot be exploited, they are not actually weak at all.

**BISHOPS:** Bishops are especially important with regard to color complexes. **A chain of squares of one color may become weak if the bishop of that color is removed.** The bishop of the same color of the weak color complex is the best defender of that complex. Without it, control of those squares can be lost.



**CONTROL:** Control of a color complex typically occurs when a player has the only bishop of the color of a weak color complex. For example, with black pawns on f6, e5 and d4, if white has the only light-squared bishop (and access to the complex), black would be weak on the light squares and white could get control of the complex. Control of a weak color complex is often worth some material or the exchange.

**WHAT TO DO:** Penetrate weak square complexes. Try to exchange a bishop that defends your opponent's weak color complex. **Once you control a weak color complex, the winning technique is generally to attack the pawns or pieces of the opposite color.** If you were near the enemy king, the object would usually be the pawn shelter around the king.

## **OUTPOSTS**

The concepts regarding outposts, support points and critical squares are similar and, in many cases, they are the same. A piece occupying a hole, deep in the enemy position, is said to have an outpost (as in a military action). You should reinforce and occupy your outposts. **More than one outpost can often be a decisive advantage. The best outposts to have are in the center or near the opponent's king.** An outpost near the opponent's king is better than one on the other side of the board.

An advanced outpost can be the foundation for an attack. From an outpost, a piece controls important squares and confines enemy pieces and pawns. Having an outpost can help to force a penetration along a file in order to occupy the seventh rank. A backward pawn can cease to be a weakness if it is blocked by a piece on an outpost in front of it. The initial benefit from an outpost is the control of nearby squares. The long-term benefits are tactical.

Occupying an outpost is such a strong positional advantage that usually you can make the decision to establish a piece on one on general principles, without calculation. You just need to be sure that it cannot be attacked by

pieces and exchanged, especially if you would be forced to recapture with a pawn (which would then seal the hole).

A knight outpost, centralized on the sixth rank is usually strong. In fact, it often becomes the decisive factor in a game.

**CREATING:** Outposts are made possible by pawn weaknesses. They are often found on the squares in front of weak pawns (for example, isolated, backward, or doubled). If you cannot find one, you will need to create one. One way is to lure a pawn from the defense of a square. Another way is to sacrifice a pawn to gain the support point.

An undefended piece, even on a potentially good outpost square, can be a liability. Only occupy a hole if your opponent cannot attack it.

**PREVENTING:** Avoid allowing enemy pieces to occupy outposts. Try to prevent your opponent from establishing effective central outposts. Contest and neutralize any attempts he makes, promptly, by driving him away or by guarding it with enough pieces that you can exchange any pieces that occupy the square. Sometimes, you can force your opponent to recapture with a pawn (which seals the hole). If that is not possible, try to match him with a central outpost of your own. **Do not waste time trying to drive away a piece that is not effective.** If you avoid trying to drive away an ineffective piece, you will save not only an unnecessary move, but also your opponent will eventually have to waste a move in relocating the piece.

**It is important not to surrender pieces that can potentially contest an outpost.** Since you can only contest an outpost with pieces, you can defend against it only by having as many pieces to exchange on that square as your opponent has for that purpose.

**PIECES, NOT PAWNS: Occupy outposts with pieces, not pawns.** Knights are usually the best suited for this purpose. Bishops are the second best. Rooks are not as good because you can attack them with minor pieces. If the minor pieces are gone or unable to attack the square, rooks can be strong on an

outpost (especially on the sixth or seventh ranks).

## ***SUPPORT POINTS***

A support point is a square, usually a central one, where you can locate a piece without it being subject to attack by pawns (or if such a pawn advance would severely weaken the position). The custody of a strong support point, occupied by a piece with a large range of scope, is likely to create further advantages for its possessor (such as the opening of a file, which, in turn, can lead to the occupation of the seventh rank). **A support point is only valuable if it is near the action.**

Once you have created the support point, you need to occupy the square with a piece. If possible, defend the piece with one or two pawns. If that is not possible, defend it with a piece.

## ***CRITICAL SQUARES***

The term “critical squares” is another one of those terms in chess with more than one meaning. It can refer to the squares around a pawn in an endgame that from which the pawn can be captured by the enemy king. Another use is in reference to a problemist’s description of a square that a piece may be moved across. Most commonly, the term “critical square” means, simply, an important square.

“The most dangerous critical squares are those protected by the king only” (George Renko, *Intensive Course Tactics 2*, CD).

## ***COORDINATION/HARMONY***

One of the most important middlegame principles is that your pieces and pawns should be coordinated. Coordination is the ability of the pieces and

pawns to cooperate with each other... to work in harmony. **The best collaboration of forces is when they dominate the most squares between them, and overlap on the fewest.** Winning maneuvers are only possible when your pieces are working in concert. Coordination is not a question of exactly what material you have, or how impressive the individual posts are, but how the pieces are positioned relative to the other pieces and how they are coordinated with each other.

Strategies, tactics, attack and defense all require that the pieces and pawns work together. The more coordinated your pieces are, the more likely you are to succeed. Trying to attack with one piece here and other piece there, without the combined coordinated cooperation of the other pieces, is futile. If the pieces are not in harmony, or soon to be harmonized, the position is bad. Even if a piece is placed well, you should relocate it if relocating it makes it work better with the other pieces.

Reducing your opponent's harmony will generally increase your own. So, keep an eye out for ways to disrupt his coordination.

**EXAMPLES:** An example of coordinated pieces would be those in a battery. In the case of a battery, the rook and queen (or rooks, or rooks and queen) team up to attack enemy territory (incidentally, usually the least valuable piece belongs in the front of a battery).

Coordination can be a matter of the teamwork of the pieces and pawns in the execution of a strategic plan, such as in a pawn breakthrough. A breakthrough with pawns, unsupported by coordinated pieces, lacks strength. Other examples of coordination would be the when the pieces and pawns are defending each other to create an impenetrable barricade, or when they are working together in a tactical maneuver.

**WHY:** Focus all of your pieces and pawns on the same objective. If your pieces can focus on a certain square, supplement or protect each other, **their collective strength is more than if they were functioning by themselves.**

The effectiveness of any single piece is enhanced by coordination with other pieces. **When your pieces are coordinated, they develop extraordinary power.** As a group, they control more space, create more pressure, generate stronger threats, and combinations are more likely to succeed. In chess, teamwork is what counts. No piece is a superstar by itself. They all must work together.

**LACK OF:** If your pieces are not coordinated before you attack, but you attack anyway by throwing material at the enemy king, your attack will be stopped. Then, since these attacking pieces will likely have been exchanged off, you will end up with an even more disjointed collection of uncoordinated (or undeveloped) pieces.

The same is often true when you win material. When you win material, the forces (which were previously focused on a certain objective) are off-balanced and are separated from the new action. A case in point is the queen going pawn hunting in the opening. When this happens, your lack of coordination can be the cause of losing back the material that you have gained, and sometimes more. That is why, before straying in order to gain material, you should be sure it would be worth the resulting disruption of your coordination.

## ***MOBILITY***

One of the most important elements in chess is mobility. The more move choices available to you, the more likely you will be able to find a strong move. Forced moves are a sign of an inferior position and ineffective piece positioning. Place the pieces so they have maximum mobility. They should control as many squares as possible. Generally, the more open the lines, and the nearer the pieces are to the center, the more mobility they have. The more squares that a piece can move to, the more mobility it has. **The real value of a piece is based on the moves it can make.** Good players put their pieces on

squares from which they can sweep the board.

The general laws of chess strategy are surprisingly simple and few in number. In fact, they can almost be reduced to one single principle which might be termed the principle of mobility... the player who places his pieces so that they have more mobility than those of his opponent will have an advantage of position. In the language of physics we might say he has stored in his pieces more potential energy so that he will be able to get more work done by them than his adversary. (Edward Lasker, *Chess for Fun & Chess for Blood*)

**Mobility is a determinant in all phases of the game.** A piece is stronger than another piece if it covers more squares. In order to make an assessment about a pawn structure, you need to consider mobility. As with the closely related concepts of harmony and activity, one position is generally considered as better than another if it allows for more mobility of the pieces. In the middlegame, in particular, the mobility of a piece can decide the game.

Mobility is the reason that three pieces are usually stronger than a queen (the total squares attacked by the three pieces combined, is more than those attacked by the queen). Accordingly, **the value of a post is based on the mobility it gives the piece occupying it.**

The value of a piece depends on its mobility, and mobility is determined by the availability of open lines. “The straight-line pieces may gain up to 10% in value in wide-open positions, and lose up to 20% in blocked positions” (Hans Berliner, *The System*).

**The bishop has the lowest potential mobility of all the pieces**, since it can only occupy half of the squares at most (all of the other pieces can potentially go to all of the squares).

**EXPLOIT: An advantage in mobility is temporary and you must exploit it or it will dissolve.** Usually, the best way to take advantage of a

mobility advantage is by attacking. **If you cannot convert it into something more long lasting or concrete, the advantage of mobility is meaningless.**

**RESTRICT OPPONENT:** by limiting your opponent's mobility, you increase your chances to win. With less mobility (often because of a restricted or cramped position), a player cannot maneuver his pieces into constructive positions. If you have better mobility, often you can force the opposing pieces to less favorable positions. If your opponent has a bad piece, try to restrict it even more. If your opponent has a piece that is completely cut off from the action, for all practical purposes, you are up a piece... and that can be decisive.

## ***BISHOPS***

**PAWN PLACEMENT:** In the opening and middlegame, the value of a bishop is based primarily on the pawn center. In the endgame, the value of a bishop is based more on the complete pawn structure. **In the middlegame, if your opponent only has one bishop, it is usually best to put your pawns on the same color as his bishop (in order to restrict its scope),** unless you have a bishop of the same color (in which case you would be restricting your own bishop as well). You will want to be sure that the pawns are protected, of course (usually in the form of a pawn chain pointed toward his bishop). **In the endgame, the situation is reversed. Then, you usually want your pawns on the color opposite of his bishop (so he cannot attack them).** If you can also put your pieces on the opposite color of his bishop, you might render his bishop useless.

Your pawns and bishops should not duplicate efforts. They should work together. Especially avoid having your bishop become a "big pawn." The strengths and weaknesses of the bishops depend largely on the pawn structure (and the strengths and weaknesses of the pawn structure depend largely on the bishops).

Avoid leaving your pawns on the same square as your one remaining

bishop. The one exception is usually when the bishop is outside of the pawn chain. It is usually beneficial if you can cause your opponent to put his pawns on the same color as his bishop. By putting your pawns on the color opposite of your bishop, it makes it easier to lock your opponent's pawns on the color squares that your bishop can attack (as well as giving your bishop more mobility).

**TARGETS:** An empty diagonal might confer a lot of mobility, but if there are not any targets on it, it might not be that valuable. On the other extreme, try not to overload your bishop. Try to keep its important usage to one diagonal.

**OPEN DIAGONALS:** Bishops need open diagonals. Bishops are less useful in semi-closed positions than open ones and may be almost useless in closed positions. Bishops can operate well from long distance. As long-range pieces, they can be effective, yet out of the way of other pieces. Sometimes, after the rooks have been developed, you can even retreat them back effectively to their original positions.

**COLLABORATION:** Because bishops are restricted to one color, **they usually need help from other pieces or pawns to be effective.** Bishops and pawns work together well, as long as the pawns are mobile (the pawns controlling one color and the bishop the other). **Bishops and knights rarely coordinate well with each other.**

**PINNING:** Bishops are excellent for pinning knights, but exchanging them for the knight is not always in your best interest. So, **only put your bishop on b5 or g5 to pin a knight to the king or queen if you are willing to exchange it for the pinned piece or if your opponent cannot break the pin.**

**STRENGTH:** Bishops gain in strength as the endgame approaches.

**London Bishop:** Sometimes the bishop can be very effective from its original square., whether it is left there in the opening or it returns there later.



John Saunders, editor of the *British Chess Magazine*, coined the label in the January 2010 issue of *BCM*, in reference to the high incidence of bishops returning to their original squares in the very strong London Chess Classic of December 2009.

## ***BISHOP PAIR***

**OPEN DIAGONALS:** With open diagonals, the bishop pair can exert their full potential. For maximum benefit, **if you have the bishop pair, you should open the position.** It can be worth a pawn (with the BB) to open the position. It is a lot easier to open a position than to close one, so the player with the pair has better prospects in that regard as well. **If your opponent has the bishop pair, you should try to close the position.**

Two knights, or a bishop and a knight, only have good chances against the bishop pair in more closed positions, or in positions that contain important support points. The bishop pair can still be strong in semi-closed positions with a strong center.

**BOTH COLORS:** A lone bishop has the weakness that it can only move on and attack squares of one color. With the bishop pair, both colors are covered and the bishops cannot even obstruct each other. The **two bishops harmonize perfectly with each other.** This is different from two knights or two rooks. A pair of rooks or a pair of knights is just two rooks or knights and, because of their redundancy, they can even get in each other's way. Two bishops, on the other hand, complement each other perfectly and, as a result, **are worth more than the sum of their parts.**

**AGAINST:** If you have bishop and knight or two knights and your opponent has the bishop pair, do not open up the position. **If you can exchange one of your opponent's bishops for a knight, it is a sign that you have out-manuevered him; it is even considered "winning the minor**

**exchange.”** Even exchanging your bishop for one of his (leaving a bishop vs. knight setup) is better than facing the pair.

**VALUE:** Two bishops in the center of the board cover 26 squares, which is only one less square than a centralized queen covers. The bishop pair keeps its high value throughout the game. It even increases as the endgame approaches. The possession of the bishop pair can be decisive.

On average, the bishop pair is worth about a half a pawn. The pair is generally worth less than a half a pawn if most of the pawns are still left on the board, and more than half a pawn if most of the pawns are gone.

**ADVANTAGE:** Having the bishop pair usually confers a long-term advantage, even if the knights seem to have good short-term potential. The bishop pair is usually better than the other combinations of two minor pieces. It is a little stronger than bishop plus knight and clearly stronger than two knights. **The advantage of the BB includes the lack of redundancy, the full-board coverage, the long range of the bishops, and their faster pace in maneuvers.** “Two bishops against two knights constitute an advantage in space rather than force” (Larry Evans, *New Ideas in Chess*).

Somewhat surprisingly, you can find testimony to the advantage of the bishop pair in the results obtained with them in the games of Mikhail Tchigorin. Tchigorin was one of the most famous advocates of the strength of knight over the bishop (back in the days when there was still some controversy to the subject). Tchigorin’s results in his own games, where he possessed a pair of knights vs. the bishop pair, were only 29 out of 71 (or 41%).

**METHOD:** If you have the BB, increase play on the squares of your opponent’s missing bishop. Open the position (even, usually, if it costs a pawn or possibly even an exchange sacrifice). One strategy is to head for the endgame (where the BB can use its full potential) by exchanging the major pieces. Another is to transform the BB advantage into another form of advantage (for example, saddling your opponent with a weakened pawn

structure, or creating a bad bishop for him).

**If you have the BB, put your pawns on the same color as your opponent's remaining bishop (to limit its scope).** Doing this will negatively affect one of your bishops as well, but the other bishop will become stronger. Further, if your opponent manages to trade bishops, it will leave you with the stronger one.

Try to open the position. Opening the position is more urgent than chasing a knight away from a good central post (you can do that later).

**HORWITZ BISHOPS:** A powerful example of the bishop pair is what is referred to as the “Horwitz Bishops.” This is when there are two bishops on adjacent diagonals on an open board. Such an arrangement can be a powerful attacking force. The term was coined by Nimzovich in his book *My System*. He spelled it “Horrwitz” in his original manuscript. It became “Horwitz” in the English translation. Probably a typo, the experts aren’t sure whether he meant “Horwitz” or “Harrwitz” (two famous players), but probably not “Horowitz,” who was only 22 when Nimzovich wrote the book.

## ***FIANCHETTO***

The relatively recent popularity of the fianchetto has changed the character of modern chess. A big factor in the Hypermodern style of chess, the fianchetto has influenced some of the basic principles of chess theory. Fianchettoed bishops are dynamic since, unlike classically developed bishops (to the fourth, fifth or sixth rank) which are more subject to exchange, they are more protected and likely to survive long enough to participate in an active fight.

**WITH:** If your fianchettoed bishop is safe from exchange, it can be excellent protection for a castled king. However, if the bishop is exchanged, it can leave a severe weakness (by leaving the squares of its color weak). Therefore, it is a good idea to trade off your opponent’s bishop of the color of

your fianchettoed bishop. Do not use your bishop to do it with though (use a knight, for example). In fact, do not exchange your fianchettoed bishop without a good reason. Additionally, if you do exchange it, be sure the weakness it creates is not too serious under the circumstances.

**To increase the influence of your fianchettoed bishop, open the center.** Another standard strategy for the possessor of a fianchettoed bishop is to initiate a pawn advance on the opposite wing.

**If you have a fianchettoed bishop, try not to move the center pawn on the same side (as the bishop) too soon.** For example, with a bishop fianchettoed on g7, try to avoid moving the e-pawn. This retains some pawn protection for f6 and does not hinder the scope of the bishop. The move d6, in this case, is usually better. The moves g6 and e6 do not usually go well together because of the dark colored square weaknesses that are created. If the e-pawn has been moved before Fianchettoing, then it might be wise not to fianchetto on the kingside. If you have a fianchettoed bishop (for example, at g7), moving the knight to its natural developing square (f6) can be a mistake because it blocks the bishop's diagonal, blocks the queen from going to h4 and stops the move f7-f5. It can be better, in this case, to develop the knight to h6 instead (or even to leave it undeveloped for a while).

Another consideration (one which is not often taken into account) is, **when you fianchetto one bishop, the other bishop automatically loses a little of its mobility.** The reason is that the pawn move that makes it possible (g6, for example) puts a pawn on the other bishop's color (the light-squared bishop).

**AGAINST:** If your opponent has a fianchettoed bishop, try to exchange it. You will usually need to make this exchange with your bishop of the same color, so try to avoid exchanging that bishop for his knight (which would leave his fianchettoed bishop unopposed and strong). If your opponent's fianchettoed bishop is exchanged, the weakness of the squares of its color will

create tactical opportunities for you. If, after the exchange, you have a bishop of the same color as your opponent's exchanged fianchettoed bishop, your advantage could even be decisive.

As black against the Stonewall pawn structure (for example, white pawns on f4, e3 and d4) it is usually a good idea to fianchetto your own king bishop (to g7). Doing so helps to restrain your opponent's f-pawn from advancing and the move g6 shields your h7 from his dark-squared bishop. The same is true, in reverse, for white.

**The weak point of the fianchetto position is the h6 square** (h3, a3, a6) because it only has the bishop to protect it. If, as white, you can get a bishop to h6 backed up by a queen, your opponent's g7 bishop will usually have to exchange itself for it or retreat to h8 (which will not work if his rook is still at f8). If you can exchange this bishop, an attack there should be effective (and possibly even decisive) if he has castled to that side.

**OPPOSITE FIANCHETTO:** The old saying "Do not answer a king-fianchetto with a queen-fianchetto" is no longer considered valid. The reason for this advice was that the queen bishop was indirectly unprotected. Nevertheless, modern thought is that this flaw is counterbalanced by the possibility of exchanging the queen bishop for the opponent's king bishop. Such an exchange would weaken both sides, but the weakness involving the defense of the king is more crucial. **When both sides have played P-K4 in the opening, a queenside fianchetto is usually weak** (because of the e-pawn obstruction). If the center is fluid though, it might be playable.

**DOUBLE FIANCHETTO:** The double fianchetto was discouraged in the old days. It is still not highly recommended (especially for black), but it is now an acceptable feature in modern chess.

If you have two fianchettoes you will usually be better off if the position is opened as much as possible. This gives your bishops the scope they need. A closed position is unfavorable. Consequently, **if you are facing a double**

fianchetto, try to close the position and gain control of the center.

## **OPPOSITE-COLORED BISHOPS**

**DRAWISH:** The drawing tendency of opposite-colored bishops in the endgame is well known. Having opposite-colored bishops can help the inferior side to reach a draw in the endgame. Often, the weaker side can achieve a draw through the method of the blockade.

If there are weaknesses to be exploited, though, opposite-colored bishops will not guarantee the draw. Furthermore, if there are other pieces left on the board, the draw is not assured. In fact, **with other pieces on the board, there is usually a sharp battle looming ahead that can often be decisive.** The reason for this is because both sides are effectively up a piece in their own attacks and those pieces can gang up on weaknesses on the color of their bishop. **“It is not always advisable to steer blindly into an ending with opposite-colored bishops, especially when other pieces are present”** (Israel Gelfer, *Positional Chess Handbook*). **As a result, in the presence of opposite-colored bishops, both king safety and pawn structure are key concerns.**

**ADVANTAGES:** If the position is winning for you, opposite-colored bishops should make it easier for you to win. When you have bishops of opposite-colors, **the possession of the better bishop decides who has the advantage.** The player who is attacking has no opposing bishop on the diagonal of his bishop, so **it is like having an extra piece in the attack.**

**SUPERIOR SIDE:** The superior side should avoid exchanging other pieces because additional pieces can augment the advantage. The reason is that the opponent’s pieces can become targets on the color of your bishop (on which you have, in effect, an extra piece). That being the case, you might be able to win the pieces instead of merely exchanging them.

**ATTACK:** The fact that the defender’s bishop cannot defend against

attacks from the attacker's bishop gives good attacking chances to the side with the initiative. In positions with opposite-colored bishops, the player with the initiative has, in effect, an extra piece. **The unopposed bishop, and the other pieces, can attack weaknesses in combination.** The defender will have problems trying to counter the attacking bishop. Not just the middle-game but also a good percentage of endgames with opposite-colored bishops can be won by attacking. Given the chance, pick targets on the color of your bishop. When the game features opposite-colored bishops, both players tend to dominate the squares of the color of their bishop. Consequently, you should look for tactics on the squares of your bishop.

**PAWNS:** Usually, **in a middlegame with opposite-colored bishops, you should put your pawns (especially the ones in front of your king) on the color of your opponent's bishop.** That way, they hinder his bishop and give more mobility to yours.

**In pure opposite-colored bishop endgames, if you are defending and trying for a draw, it can be best to put your pawns on the same color as your bishop.** That way, your bishop can defend the pawns. In any other situation (for example, if there are also rooks on the board), your pawns usually belong on the opposite color of your bishop.

If there is a disparity in strength, the stronger side (or the side trying to win) should put his pawns on the same color as his opponent's bishop (as usual). The weaker side (or the defending side) should also put his pawns on that color (the color of his bishop). In other words, both players should put their pawns on the color of the weaker side's bishop.

The stronger player does this in order to retain activity on the squares of his own bishop, and he should put his pawns on opposite color of his bishop regardless of whether his opponent has a bishop or, if the opponent has a bishop, what color it travels on.

The weaker side puts the pawns on the color of his bishop in order to

defend them. This is one of the rare cases that the general principle (of putting your pawns on the opposite color of your bishop) is reversed. The reason is that sometimes the weaker player can set up a fortress where he is able to blockade a passed pawn on the color of his bishop. He can often hold off several pawns this way. In order to overcome this kind of defense, the stronger side often needs to obtain passed pawns on both sides of the board.

In positions with opposite-colored bishops, activity is more important than the pawn count. **Weakened pawns can be disastrous for the owner in opposite-colored bishop endings.**

## ***GOOD AND BAD BISHOPS***

**PAWNS:** All pieces are good or bad depending on their mobility. The situation with bishops is particularly significant because bishops travel on only one color and can be hemmed in by pawns. As a result, the bishop's mobility is mostly determined by the pawn structure. Fixed pawns are what establish whether a bishop is good or bad. An immobilized pawn can hinder the scope of a bishop (or even completely lock it in).

Usually, **putting your pawns on the same color as your bishop is not a good idea, especially if they are blocked pawns.** If the pawns later are able to move out of the way, though, the bishop might get its mobility back and the temporarily bad bishop may become good again. However, **bad bishops tend to have a constant or long-term quality.** If the obstructing pawns are fixed, the exploitation of the advantage can progress systematically and without undue haste.

There is also a strategy where a player places his pawns on the color of his opponent's bishop so it "bites on granite." This can create a barrier that makes it difficult for the opponent to breach. Sometimes, this can even turn the opponent's good bishop into a completely ineffective one.

**In the opening and middlegame, the c-, d-, e- and f-pawns (especially**



**the d- and e-pawns) are much more important than flank pawns when it comes to affecting the degree of how good or bad the bishops are.** The other pawns are almost irrelevant in this respect. However, if the side with the bad bishop has a space advantage in the center, the bishop may still have plenty of mobility behind those pawns. In the opening and middle-game, determining whether a bishop is good or bad depends mostly on the center pawns. In the endgame, the position of all of your pawns will determine it.

**If you have your pawns on the same color as your bishop, your squares of the other color are likely to be vulnerable.** The duplication (between pawns and bishops) of the inability to influence the opposite color can leave the other colored squares inadequately protected. When most of your pawns and a bishop are on one color, the squares of other color are going to be weak. Often, the entire pawn structure is fundamentally weak when you have a bad bishop. Generally, the more pawns that are on the same color as your bishop, the worse the bishop is. **On the other hand, if your bishop is on the opposite color of your pawns, they will be working together in harmony.**

**GOOD BISHOP:** A bishop is good when its central pawns are not on the same color as the bishop. A good bishop is not impeded by his own pawns. A bad bishop can become a good bishop if the position opens up. **Having a good bishop allows you to attack your opponent's pawns and to have the room to move among your own pawns.**

**BAD BISHOP:** A bishop is bad if it is of the same color that most of its pawns are fixed on (especially the center pawns). There is no requisite predetermined number of pawns in order for a bishop to be considered bad. Even one center pawn on the same color can be enough. Even one center pawn reduces the bishop's mobility. Having low mobility is not enough cause to call a bishop "bad." The mobility has to be so poor that the bishop will have trouble, or will never, realize good mobility. Because there are pawns in the way of the bishop does not mean it is bad. You have to take into consideration the

possibility that those pawns might move. The more pawns fixed against the bishop the worse the bishop is.

**OUTSIDE CHAIN:** The bad bishop usually belongs outside of the pawn chain. If the bad bishop is active outside of the pawn chain and the other pieces can cooperate with it, it can still be a good piece. If it occupies a strong point, which is impervious to attack by pawns, it can even be stronger than the good bishop (though it is still a bad bishop by definition).

**EXCHANGE:** You can correct a “bad bishop” problem by exchanging the bishop for an equal, or better, piece. The disadvantages of a bad bishop are accentuated, as the endgame gets closer. **If you are headed into an endgame with a relatively fixed pawn structure and a bad bishop, try to exchange the bishop.**

If your opponent has a good bishop, try to exchange it. Ideally, exchange your bad bishop for his good bishop. Such an exchange can completely turn the game around.

**ATTACK:** Having a bad bishop is a handicap for the player who wants to attack. It means, effectively, that there is one less piece in the attack.

## ***ACTIVE BISHOPS***

An active bishop can be a good bishop or a bad bishop. The term refers to its activity, not its mobility. A good example of the difference in terms would be a bad bishop that is serving an active role outside of the pawn chain. The bad bishop, in this case, could have little or no mobility but could still be an active bishop. **The active bishop is a tactical feature of a position, so it is usually a temporary attribute. Because it is temporary, you could use it to get an attack started.** The active bishop attains its most power in positions where the center is completely open.

## ***KNIGHTS***

**MOVE:** Knights are the only pieces that do not move in a straight line. A knight can move to any opposite-colored square in five moves from any square on the board. **If a knight is not on the rim or close to a corner, it can move to any opposite-colored square on the board in three moves. It can move to any same-colored square in four moves** (except if the target square is in the diagonally opposite corner).

The knight is, in many ways, the ideal companion for the queen. Their moves complement each other. Their moves are also unusual in relation to each other: when the knight attacks the queen, the queen cannot attack the knight (and vice versa).

**The knight moves to a different color with each move. So, it cannot gain a tempo** (or bring about the same position with a change in who is on the move) by a maneuver like a king's triangulation or a piece making two moves then returning to the same square on the 3<sup>rd</sup> move (it can only return to the same square on even numbered moves). This can be a serious endgame disadvantage.

**PSYCHOLOGICAL:** It is more difficult to visualize the knight's moves. It is the most unusual piece on the board. That is why it is easy to overlook possible knight moves. This can be a problem, both when planning your own move and when considering your opponent's possibilities.

**ADVANCED:** Knights generally gain power the more advanced they are (up to the seventh rank). A knight on its first or second rank is normally only useful for defense. On the third rank, it can be useful defensively as well as being poised for advancement. On the fourth rank, the knight is usually equal to a bishop and ready for either attack or defense. A knight on the fifth rank is ideally placed as an attacking piece and frequently stronger than a bishop and (if supported by a pawn) may be equal to a rook.

**The knight generally reaches its peak strength on the sixth rank.** On the sixth rank, the knight is usually worth a rook and is often so powerful that

it can decide the game. A knight on the seventh or eighth rank is not usually quite as strong as it is on the sixth rank, because it starts to lose some mobility.

Along with these generalities, one must remember that the location in relation to the action is crucial. For example, a knight on the sixth rank on the queenside is not usually useful if his own king is being attacked on the kingside. A white knight at c6 is usually better than one at b6 (if the black king has castled kingside), but being at e6 or d6 is even better (closer to the action).

**CLOSED:** It is usually best to have pawns available to support knights. A knight out in the open can be a liability. **Knights are ideally suited for closed positions with blocked pawn structures.** This is because they can jump over obstacles. **Knights lose value with every pawn exchange because their capacity to leap over other pieces becomes less significant as pawns come off the board.** If the position is closed, the knight is better than a bad bishop and often better than a good bishop. If the position can be kept closed, the knight is usually superior to a bishop.

The support points in the center, that knights thrive on, usually develop from closed positions. This is why closed positions and semi-closed positions (such as Stonewalls and blocked oblique centers) are usually best suited for knights.

**CENTRALIZED:** Usually, the more centralized the knight is, the better. The saying goes, “A knight on the rim is grim.” As World Correspondence Chess Champion, Grigory Sanakoev, said, in his book *World Champion at the Third Attempt*, **“In general terms a knight in the center is always well placed!”** The knight is usually best located on one of the two central squares on its fifth rank (d5 or e5 for white). Knights are particularly strong if you can securely locate them in the center or in the heart of the enemy position. A knight in the center, guarded by a pawn and protected from attack from enemy pawns, is more valuable than a bishop and worth almost as much as a rook. On the other hand, a knight near the edge of the board loses a lot of its power.

Modern chess views are not as rigid about decentralized knights as they were in the old days. Nowadays, it is thought that knights can still perform valuable functions from the edge by cooperating with other pieces and allowing for pawn advances. As always, it depends on the position.

**SUPPORT POINT:** Henry Hunvald quotes, among many others, two giants in his book *Chess Quotations from the Masters*, “**Seize the outpost K5 with your knight and you can go to sleep. Checkmate will come by itself**” (Tartakower), and “**Once you get a knight firmly posted at king 6 and you may go to sleep. Your game will then play itself**” (Anderssen). Of course, you cannot take these exaggerations too literally! It is the point that is important.

Since knights are not long-range pieces, they benefit tremendously by having a safe haven in the center where your opponent cannot attack them with enemy pawns (if they are also performing a blockading function, so much the better). Knights can even be effective in open positions when they are able to occupy a support point.

**WEAK SQUARES:** Knights thrive around weak squares and isolated pawns (even if the weaknesses are on both sides). Any pawn structures with rams, isolation, backwardness, doubled pawns, or reduced mobility (all of which generally allows the knights to centralize on protected squares) are favorable for knights.

**BLOCKADE:** A knight belongs in front of an opponent's isolani. Knights are usually the best piece to use for the blockade because it can jump over other pieces, including the pawn it is blocking. Besides, having the shortest range of all the pieces, there is less invested in the blockade (it is the cheapest blockader).

**PAIR:** **The knight pair is not a good combination.** There is nothing that one knight can do that the other one cannot do. In this way, they duplicate each other, they get in each other's way, they run into each other and they

decrease each other's possibilities. One knight might even occupy the other knight's ideal square. **They are at their weakest when they end up protecting each other** (they often end up being trapped in this position until the predicament is finally exploited). Of course, there are times when the pair can be beneficial. If you have a knight pair, they are best used side by side. This way, they can sometimes form a barrier.

**AGAINST:** If you are facing a knight, remember that **it cannot attack two squares of different color at the same time**. Keeping this in mind can help you decide where to put your pieces. This same idea can help to simplify many knight endgames as well.

Sometimes, you can lure a knight to a post that is far away from the action. This maneuver can sometimes be beneficial. For example, you should benefit if you can lure your opponent's knight to b6 when the action is, or is about to be, centered near g7. This is a common practice in modern play.

Knights can make good targets for pawns, particularly for the aim of gaining tempos. If an opponent's knight is on g6, for example, the push h4-h5 is often a good plan.

**DEFENDER:** There is a saying: **"bishops for attack, knights for defense."** The knight can be a good defender for the castled king, but it is not generally a good defender of other pieces because it can only defend from one square at a time. If it is forced to move, the defense is lost.

## ***BISHOPS VS. KNIGHTS***

**PAWNS:** Bishops are usually stronger than knights in open positions because they can move and create threats on both sides of the board. The more obstructions that disappear, and the more open diagonals, the better the bishop becomes vs. the knight. **If the pawn position is mobile, the bishop is stronger than the knight.** In endings with only a few scattered pawns, or passed pawns on both sides of the board, the bishop is usually stronger than

the knight. **Bishops are usually better than knights when there are pawns on both sides of the board.**

The knight can be better than the bishop if the position is closed or there are blocked pawns on the board. Even though it might be better to have knights in closed positions, keep in mind that closed positions can open up. Knights are often better than bishops when there are pawn weaknesses for it to attack. This is because knights can reach all of the squares. **Bishops can only capture pawns on one color, knights can get them on any square.** There is another time when knights are particularly valuable. As Bronstein put it:

There occur, and extremely often, situations where the outcome of the struggle is decided along a narrow section of the front. This is where the knights are irreplaceable. And, if the pawn chains are closed up, even temporarily, there is no greater aid than a knight. (David Bronstein, *200 Open Games*)

**RANGE:** The knight's range is much smaller than the bishop's is. Knights are short-range pieces; bishops are long-range. A knight in the center attacks eight squares; a bishop attacks thirteen.

**VALUE:** Bishops (when the pair is still intact) are, on average, slightly more valuable than knights. However, when there is one bishop vs. one knight, they are equally valuable. What makes one more valuable than the other is entirely due to the circumstances (for instance, the pawn structure, the stage of the game, or the position). The bishop usually gains a little value as the endgame approaches. By then, it could be worth the investment of a little more than one tempo (but usually not quite two) to get a bishop for a knight.

**EARLY:** The knight is usually a little better than the bishop in the opening and early middlegame. It can attack a little sooner and it can occupy center squares. The bishops cannot move as easily in the early stages because there are still a lot of pawns on the board. Exchanging the bishop for a knight in the

early going can be a slight short-term advantage, but, as the game goes on, the value of the bishop usually increases.

**COMPARISON:** Bishops are usually preferred over knights because of their difference in mobility. The bishop can have superior mobility on each move in an open position, but it can only cover half of the squares on the board, whereas the knight can potentially cover them all. If you eliminate all of a knight's advanced support points, the knights will be relatively useless and the bishops will likely prevail.

**The kinds of positions that favor the bishop are more frequent than those that favor knights.** Bishops are long-range pieces; knights are short-range pieces. The bishop can attack squares on both flanks simultaneously. If a knight is forced to leave a post, it can no longer guard the squares it did before the move. A bishop can move and still guard the same square it guarded before the move. Bishops can also counterattack a pawn that attacks it, whereas knights cannot. The bishop can single-handedly immobilize a knight on the edge of the board.

Knights are about equal to bishops on the fourth rank, better than a bishop on the fifth rank and often equal to a rook on the sixth rank. If pawns get in the bishop's way, the knight can be better than the bishop. The knight can move to squares of both colors. The knight's mobility is not impaired by contiguous pieces.

In the opening, knights are often more active than bishops. If play is in isolated sectors, in closed positions, or in the endgame with the pawns all on one side, the knight can be better. If the center is not blocked, the bishop is likely to be superior. When the knight is facing the bad bishop, the knight's advantage will increase as the material on the board decreases.

The combination of bishop plus knight is stronger than that of two knights. The bishop pair is the strongest combination of two minor pieces. Yet, in certain positions, bishop plus knight can be preferred over the bishop pair.



For example, if you want to attack a certain square, the bishop pair can only attack it once, whereas the bishop plus knight can attack it twice. It can also be good to have the bishop and knight when you are not sure where the position is headed. By keeping one bishop and one knight, you will be ready for most prospects.

**METHOD:** Do not exchange a bishop for a knight without a good reason. If you have a bishop vs. a knight, it is usually best to exchange some pawns to increase the bishop's mobility. You should try to keep the pawns mobile. Try to remove all of the advanced posts that the opponent's knight could use. Try to lure your opponent's pawns onto the color of your bishop so they will be susceptible to your bishop's attack in the endgame.

If you have the knight vs. bishop, you should try to lock the pawns on the color of your opponent's bishop. You should try to find advanced posts for the knight. Try to keep your weaknesses on the color opposite of your opponent's bishop.

**COORDINATION:** Bishop plus knight vs. the bishop pair can have combined power because they can both attack the same square (whereas two bishops cannot). Still, the bishop pair is usually superior to knight plus bishop (unless the center is blocked) because, together, they cover both color squares.

One way to understand the coordination of various piece pairs can be by considering their co-operation when used together in an endgame mating attempt against a lone king: With two knights, it is almost impossible; with a bishop plus a knight, it can be difficult, but with the bishop pair, it is easy.

## **ROOKS**

**PLACEMENT:** Rooks operate best from a distance. In fact, being too close to the action can often be unfavorable. **In the opening and middlegame, rooks usually work best from the first rank.** If they are placed on the third or fourth rank, it is usually as a part of a plan to be involved in a kingside

attack. **It is not usually a good idea to put a rook in the center.** Your opponent can harass it easily in the center (like a queen).

The rook does not gain any mobility by being located on e4 (over being on e1). As a result, it should usually be left on the first rank. Typically, the rook (like the queen) should wait a while before entering the game. Early in the game, it is exposed to possible harassment by minor pieces and pawns (at the gain of tempo). Rooks should generally work from positions that are more basic until the board is opened up a little and they have a good way to enter the game.

**Try to place your rooks so that neither of them needs protection. Avoid putting a rook behind a pawn on its original square, even if you are planning to move it later.**

One of the most reliable maxims in chess is: **Never use a rook to defend a pawn.** It is different when you put a rook behind a well-advanced pawn, for you do that rather to back up the pawn's advance than to defend it. (Cecil Purdy, *C.J.S. Purdy's Fine Art of Chess Annotation*)

**OPEN FILES:** Before automatically placing a rook on an open file, consider its purpose there. There must at least be the expectation of a useful reason for the rook to be on the file. For example, if the rook can penetrate into the opponent's position, access a turning point, or hinder the opponent's play in some way, it is probably a good idea to occupy the file. Otherwise, another move might be better.

**Rooks are better than minor pieces only if they can infiltrate the opponent's position.** This has to be done on an open file. **If there are not any open files, the rook is often worth less than a good bishop or knight.** Often, it is worth a sacrifice to open files for the rook. **If there is only one open file, double the rooks on it.**

Rooks are not only effective on open files, but also open ranks and open

positions in general. **Sometimes, you can place a rook on a closed file effectively as a means of discouraging the opponent from opening the file.** Nimzovich called this his “mysterious rook move.”

**If you plan to contest a file, consider first whether contesting it is advantageous for you.** Consider whether, once getting it, it is possible to penetrate along the file. Consider your strategy, the coordination of all of your forces, and consider whether a wholesale exchange is likely on the file. After considering all of these elements, you might decide that contesting it is not necessarily the right plan.

**TURNING POINT, SEVENTH: To be strong, rooks must have a turning point on the file they occupy.** Getting a rook on the seventh rank usually gives the attacking side a decisive advantage. **Having a rook on the seventh rank is usually worth a pawn.**

**CENTRALIZE:** many combinations on the side of the board do not involve rooks, but the rooks play a primary role in central combinations. You should usually try to get at least one of your rooks to the center files in the opening. **Try to decide first which file the rook will be the most effective on, but even if you are not sure which is the best file for it, try to centralize at least one of them.** Rooks exert no more scope from the center than they do from anywhere else (14 squares), but their presence can sway the balance of power there.

**MOBILITY: The power of a rook does not change from square to square. It always has the same possible range.** Unblocked, it can reach any square on the board in one or two moves. For that reason, its superiority over the minor pieces is greater than the superiority of bishop over knight. The rook’s mobility can be greatly reduced if it is not able to change files or change from a file to a rank (or vice versa).

**ROOK LIFT:** Sometimes, you cannot occupy an open file or you cannot open a particular file. For example, if you and your opponent are castled on the

same side, a file opening against your opponent's king would weaken your own king position. In these cases, it can be advantageous to put your rooks in front of your pawns.

You might put a rook on the third rank to maintain the option of moving it to a different part of the board, while at the same time keeping its control of the file on which it occupies. **If you have a rook stranded on h1, advancing the h-pawn is often a good way to get the rook into play quickly.** If you plan to use a rook lift, it can pay to avoid moving the pawns that will impede the transfer of the rook to the desired file.

**WHICH ROOK:** If you have a choice of which rook to move to central file, choose the one that is doing the least or the one that will leave the other rook with the most mobility.

**ENDGAME:** The rook's scope increases as obstructions are eliminated. As a result, the power of the rook usually increases as the endgame approaches or as pieces and pawns are exchanged. Rooks are perfect for attacking pawns. Rooks (and queens) are well suited for attacking weak pawns. The rook is at its best when chasing pawns in the endgame.

**WITH MINOR PIECES:** Rook and bishop work together better than rook and knight, especially in open positions. When your rooks have an open file, your bishop pair will be more effective.

**TWO ROOKS:** Connecting rooks on a rank or doubling them on a file is strong. If this joining of forces is in an important direction, it can be decisive. At a minimum, such a union will usually cancel out any advantage that your opponent might have. **The strongest piece combination in chess is probably two rooks plus the bishop pair working in collaboration.**

## ***ROOK VS. MINOR PIECE***

The rook is usually stronger than a minor piece, but there are numerous positions where the opposite is true. It is difficult for minor pieces to play

against a rook and a passed pawn on the edge of the board. **The minor piece has the best chance to prevail when there are no open files.** In closed positions, a knight can be as strong as a rook. **In closed positions, often sacrificing the rook for the knight is the best solution.**

**If you have two rooks and your opponent has a rook and a minor piece, you should exchange one of your rooks for your opponent's rook.** That way, the redundancy of the rooks is eliminated, your superiority is more pronounced, and you will have two different kinds of pieces working for you. Similarly, **if you have two rooks and your opponent has two minor pieces, you should exchange one of your rooks for your opponent's rook.**

## **QUEENS**

**STRENGTH:** The queen is a piece that, because of its tremendous mobility, is mostly suited for tactical purposes. It also can be a principle factor in carrying out strategic plans. It can even be the focal point of a strategy (for example, when the queen is the only remaining piece).

**The queen is the most powerful piece on the board. Yet, in a sense, it is also the weakest.** Since, if it is attacked, it usually has to run. It also needs the right kinds of positions in order to demonstrate its power. Otherwise, its strength is lessened. Without weaknesses to attack and other targets, its power is substantially reduced.

**It is an offensive piece. Defensively, it is still only one piece and can only attack a certain square one time, like any other piece.** As a defender, it is poor. Against other pieces, it can be outnumbered when attacking a specific square (which can subject to the combined assault of several pieces). The queen coordinates well with other pieces, but it is not always effective on its own.

**In a battle with other pieces, the queen does best in complex or even wild positions. It functions well in positions that contain several**

**weaknesses and where it can be mobile.** If there are some loose pieces and pawns and some open lines against the opponent's king (for the queen to use for checks to gain tempos, change directions, double attack, and other tactic and strategic maneuvers), the queen is in its element. In more stable or solid positions, though, the queen can be dominated by rook and minor pieces or minor pieces alone, especially if central outposts are available for the other side.

**OPEN POSITIONS:** The most important quality of the queen is its mobility. It has more potential mobility than any other piece. This gives the queen vast tactical powers. **The queen thrives on open lines.** Open lines are needed to turn the queen's potential mobility into useful activity,

**SEMI-CLOSED POSITIONS:** If the position is semi-closed, and there are no pawn breaks available (but there is a chance of play developing on either flank), centralize the queen.

**CLOSED POSITIONS:** The queen can still do well in closed positions because of its huge influence in every direction, especially if there are tactics looming in the position.

**BEHIND:** Generally, the queen should not lead a battery. It should support the other pieces from behind. The queen should usually even stay behind pawns. **The queen should usually be the last of pieces when tripled on a file with two rooks,** as in the so-called "Alekhine's Gun (queen on d1 and rooks on d2 and d3)." The queen should usually move in to mop up after the initial attack or, in the case of a direct attack on the king, to cover any escape squares.

**CENTER:** Placing a queen in the center is controversial and probably depends entirely on the circumstances. Queens radiate more power the closer they are to the center, but they are also more vulnerable there. Overall, it is probably a good idea to try to centralize the queen whenever its safety is not an imminent issue.

Generally, during the early phases of the game, the queen should avoid too much centralization. In the later stages, though, it can be advantageous to centralize the queen in order to take advantage of its power.

**WITH BISHOP:** It is usually a good idea to put your queen on the opposite color of your opponent's bishop.

**EXCHANGE:** Whether to trade queens is usually a crucial decision. It may be easier to mate with the queens on the board, but **if the position calls for an exchange of queens, it can be a serious error to avoid doing so.** If you can obtain an advantageous endgame by exchanging queens, keeping them on for the possibility of drumming up an attack can be a mistake. On the other hand, **if you have a dynamic advantage, but a static weakness, it might be better to keep your queen.** Small material and positional advantages tend to grow and dynamic elements tend to diminish with the queens off.

Generally, you should not exchange queens if:

- You are far ahead in development.
- You are attacking.
- You are behind in material.
- Your king is safer than your opponent's king is.
- Your opponent's king is exposed.
- You have a more favorable complementary piece (for example, you have a knight vs. your opponent's bishop).
- You have two minor pieces for a rook and two pawns.

You probably should exchange queens if your opponent's queen will be more active, if you have a material advantage, or you will have a better endgame.

When your opponent offers you a queen trade, remember:

It is important to evaluate on its merits. There is nearly always some

disadvantage involved in avoiding the trade—your queen retreats, occupying a more passive position than before—while the trade could offer fresh advantages, especially if you are not a great deal of material down to begin with. (Sam Collins, *British Chess Magazine*, February 2009)

Strong players will often trade their queen for a rook and a minor piece, or other equivalent combinations. Weaker players tend to avoid these situations. The strong player, who knows how to use the imbalance, often uses this idea against weaker players.

**ENDGAME:** When the queens are still on the board, the battle is usually of a middle-game nature. The side with the initiative can usually dictate whether the game goes into an endgame by forcing the exchange of queens.

**TWO ROOKS:** With two rooks vs. a queen, the queen is usually much better early in the game when it is aided and protected by other pieces (and the rooks, which need open files, are hemmed in by pawns). The rooks gain in value as the pawns come off the board, because of open files. The two rooks are usually better in the endgame for this reason. In the endgame, if the side with the queen also has a pawn (or if there are minor pieces still on the board), the chances are often about equal.

The queen prevails in positions where it can attack weaknesses or an exposed king. The rooks are best when they are on open files or connected on the seventh or eighth ranks. In these positions, the rooks can take advantage of the queen's poor defensive powers.

**TWO QUEENS:** A condition that exemplifies the redundancy of major pieces is that of two or more queens. The extra queen can be somewhat redundant. It duplicates many of the moves of the first queen and can actually get in the way of the other queen. There is, of course, an added value, but not as much as the material count would suggest. The power of the two-queen combination is only made apparent under certain conditions. With three or



more queens on the board, the position is under a lot of tension and tactics will usually rule.

## ***BLOCKADE***

Nimzovich developed the concept of the blockade. The idea, mainly, is to stop the advance of an enemy pawn by putting a piece in front of it. You would do this, as a defensive maneuver, prior to launching an attack of your own. The blockade can be of one pawn or of many. The idea is to limit the mobility of the pawns and their attacking possibilities. Technically, you can use the blockade against any piece, but because pawns are the easiest to blockade and the most dangerous to let advance, for all practical purposes, the term is only in reference to pawns.

**WHY:** Even in chess, **it is harder to hit a moving target than a fixed one. By first immobilizing the target pawn, it is easier to mount an attack on it.** If the pawn is not blockaded, it can advance whenever your opponent wants it to (which might be at an inopportune time for you). Since you never know when that advance might happen, you have the threat of it hanging over your head all of the time.

**BLOCKADER:** **The blockade square usually becomes a strong point for the blockader and often becomes a weak point for the side with the blockaded pawn.** The blockading piece not only blockades the advance of the pawn, but also is not vulnerable to that particular pawn's attack since it is directly in front of it.

**The best blockader is the knight.** Its power is not diminished by being in front of the pawn (it is not, in turn, blocked by the pawn), it can attack squares behind the pawn and, being a short-range piece, its restriction to the one square is not as much of a reduction in force as with the long-range pieces. The bishop can be a good blockader, as well, for the reason that it is not hindered by the pawn and it can continue to exert pressure on the diagonals. In fact, it can

sometimes simultaneously prevent several pawns from advancing. However, being a long-range piece, using a bishop is not quite as efficient as using a knight for a blockader.

**The king can be a good blockader, especially in the endgame.** It is a short-range piece and is not hindered by the pawn. **It has the added benefit of being able to move in all directions. As a blockader, the king ranks second to the knight. The queen is a poor blockader.** The queen is primarily a long-range attacking piece, and it can be harassed by minor pieces. That is why it is usually only used as a temporary blockader, or in emergencies. The rook is usually considered the worst blockader because it has all of the drawbacks that the queen has, and it has less flexibility than the queen does.

**METHOD:** For the blockader, **the object is usually to blockade the pawn, not necessarily to win it (you might do that later).** The idea is to let it be **an obstacle for your opponent's forces and something he has to concern himself with continuously until you are ready to take it.**

If you have an isolated pawn that your opponent is trying to blockade, try to advance it and trade it for one of your opponent's healthy pawns. If you have a passed pawn that your opponent is already blockading, try to drive the blockader away so your pawn can advance.

**SACRIFICE:** **It can be worth the sacrifice of a pawn to set up a solid blockade, especially in the case of opposite-colored bishops when the blockaded pawn is on the color of your opponent's bishop.** In this case, not only does the pawn hinder his bishop's movement, but also he cannot use the bishop to help dislodge your blockader.

## ***CENTRALIZATION***

Centralize your pieces. Control of the center, from the early middlegame through the endgame (by pieces or pawns in or around it), usually gives its possessor a sizable advantage. Pieces, especially minor pieces, gain in power

and effectiveness as they move toward the center, and they reach their zenith when actually posted there. Tactics and combinations spring from well-centralized positions.

The idea of centralization is to bring your pieces to central locations where they can work together, harmoniously, toward a common goal. This does not mean that it is a good idea to try to put all of your pieces in the center. If you did, they would get in each other's way and they would be subject to attack.

The actual occupation of the center with pieces is not always necessary and is only of real value if it is long lasting. **The physical occupation of a square can actually reduce your control of that square. Sometimes, controlling the square or preventing a hostile piece or pawn from occupying it is enough.** It is only practical to bring your pieces to the center when sufficient control over it has been acquired.

**Centralization is an essential element in nearly all positions, even unclear ones.** Sometimes, one centrally located piece can confer an advantage. In unclear positions, a centralized piece can sometimes bring the position into focus. Pieces that are centralized not only have more power, but also are more flexible. They are ready to shift to either wing as necessary.

**Moving a piece away from the center is usually a doubtful move. Consider any decentralizing move carefully. Likewise, any time your opponent decentralizes a piece, look for a way to punish the move.** It is risky to decentralize, even to eliminate an opponent's most important attacking piece.

Before getting into a slugfest, it is often a good idea to regroup and centralize your forces. Unless there are reasons not to, **it is usually a good idea to centralize isolated pieces before initiating an attack.**

Top players are religious about adhering to this principle. Sometimes I think they silently chant the mantra "centralize, centralize, centralize..."

during a game. Of course, in the heat of battle, players often lose sight of this principle and simply forget to occupy vacated central squares with queens and rooks at the cost of losing the fight for the center. (Larry Christiansen, *Rocking the Ramparts*)

## ***SIMPLIFICATION/LIQUIDATION***

**RELATIVE VALUE:** As pieces are exchanged and the position is more simplified, the relative value of the remaining pieces and their relative positional importance becomes more noticeable. A piece that is poorly placed becomes more obvious, and the difference in force actually becomes greater (for example, two pieces to one is a larger advantage than five pieces to four). **In addition, as pieces leave the board, more squares become available for the major pieces; so, the major pieces grow in power.**

**POSITIONAL:** When you are ahead in material, or you have acquired a positional advantage that can be exploited in the endgame, it is usually a good idea to simplify to some degree. It is ill advised to surrender any positional advantages, though, for the sake of simplifying. **When you simplify, try to keep some pawns on the board.** Without pawns on the board, your opponent will often have good drawing chances. Besides, endgames with only pawns on the board are the easiest to win. If you were behind in material, you would want to get your opponent's pawns off the board with the idea of swapping down to a position with insufficient mating material, or to a known drawing position.

**SURE WIN:** Strong players will usually go for the long sure win over the short risky route. Simplification can be the surest way to accomplish the win. Along the way, do not liquidate any advantages unless you know you still have a sure win.

**DICTATES:** If the position calls for it, you should simplify. It sometimes feels risky to simplify against a weaker opponent, as well as when you need a

win. The threat of drawing a must-win game can cause you to fear simplifying, but if the position calls for it, that is what you should do.

## **SPACE**

**MEASURING:** In general, a space advantage is the occupation of a greater part of the board. Some signs of a space advantage are:

- Having control of the center.
- Having more advanced pawns than your opponent has.
- Having your advanced pawns further advanced than your opponent's advanced pawns.
- Your opponent's position is cramped.
- Having control of open files.

One way to measure space is to count the squares between your pawn barrier and your first rank (or within the scope of your pieces) not counting the pawns themselves. This way of measuring space takes into account that, as the pawns disappear from the board, the concept of space becomes less measurable, until it finally evaporates into a pawnless endgame (in which space is no longer a concept). Another way to measure space is to add the squares occupied to those that are attacked past frontier line.

**ADVANTAGES:** It cannot only be difficult to determine who has the space advantage, but it is often difficult to say what particular advantage it is at the time. Usually, the reward of having a space advantage is having more room to maneuver your pieces while leaving less room for your opponent to maneuver his pieces. This cramps your opponent's pieces, drives them to the edge of the board, and makes it difficult for them to respond to a sudden change of focus. It also makes it easier for you to post your pieces effectively.

Having a space advantage:

- allows your pieces to be more mobile and active than your opponent's
- makes it easier to shift pieces from one wing to the other (or play on both sides at the same time)
- implies that your pawns are closer to promotion
- helps with the harmonious interaction of the pieces
- confers the ability to focus your pieces for attack or defense in one area of the board

The value of the squares controlled by the player with a space advantage is much more important than the number of them. These are the squares and lines where activity is promising. **The whole idea of gaining space is to create activity.**

Even though the notion of space diminishes as the board empties, the value of it does not. It is always important. **“The more territory you control, the easier your game becomes”** (George Koltanowski, *Colle System*).

**SEIZING: To obtain a clear space advantage, block the center or gain firm control over it.** It is of little value to have a space advantage on a wing if the center is not blocked or you do not have control of it.

Seize space. Try to keep your opponent from gaining space. If he invades your side of the board, confront him immediately. “Sometimes I would ‘squeeze’ the few remaining drops of advantage out of a simplified position by playing the only possible card—taking control of more space” (Svetozar Gligorić, *I Play Against Pieces*).

**SPACE VS. TIME: As a rule, especially in closed positions, space is more important than time.** Time is of little significance when one player has control of most of the space. **A strong player, given a choice between a temporary time advantage and a longer-lasting advantage in space, will usually take the space.** An advantage in space is a long-term advantage.

**LIABILITY:** There is a down side to having a space advantage. As the pawns advance to create the space advantage, they lose the possibility of

controlling squares in their wake. Some of those squares could be critical squares. The potential for controlling squares decreases with every pawn move. **The area behind the pawn front can be a liability if your opponent can operate in there as well as you can.**

If your opponent is cramped, that is good for you. Yet, if he manages to exchange off those cramped pieces, or get them behind your pawns, there is no longer a problem for him.

The side with a space advantage has to be careful not to get overextended. If he becomes overextended, he could be subject to a counterattack. In the attempt to expand our pawn front, we frequently leave potential weaknesses behind. These weaknesses can become targets for your opponent.

**WITH: The general rule is that a player with more space should avoid exchanges.** However, there are many exceptions. It is important not to routinely avoid simplification. You always have to consider the position.

The general idea is that, by exchanging pieces, you would be trading off your opponent's problems. You should generally avoid exchanges, or other moves that frees the opponent's position (or gives him more space).

If you have more space than your opponent has, you should try to get still more. Try to ruin the opponent's structure at its strongest spot. The player with the space advantage should usually play where that spatial advantage is.

**AGAINST:** If your opponent has the space advantage, remember that every exchange favors the side with less maneuvering room. Accordingly, when you are behind in space, exchanging pieces is often the solution. Remember that there are many exceptions. So, do not automatically start trying to simplify. Consider the position.

## ***CRAMPED POSITIONS***

**AGAINST:** To paraphrase Dr. Siegbert Tarrasch, cramped positions contain the early symptoms of defeat. If your opponent has a cramped position,

eventually he will most likely make a weakening move. A cramped position usually requires more pieces to defend properly than the attacker needs for his attack because the pieces cannot operate efficiently under the cramped conditions. This, in turn, makes the position even more cramped. **If your opponent has a cramped position, take your time;** hold off on your break until it has maximum power. Meanwhile, try to avoid exchanging pieces.

There is also a psychological value to having your opponent in a cramped position. He is likely to become demoralized and start making mistakes.

**WITH:** If you have a cramped position without any compensation, and you cannot get more space yourself, the best idea is usually to exchange pieces. **“Free cramped positions through exchanges”** (John Grefe, *Progressing through Chess*). This will provide you with more room in which to move your pieces, increase your chances of finding active squares for your remaining pieces, and cut down on the congestion (which is at the root of the problem). Pawn moves that free the position can also be effective. Except that, if you have a cramped position, and you are behind in development, it can be dangerous to open the position. In such a situation, it is important to be aware of your opponent’s breaks too. If the position becomes opened, he will likely be in a better position to exploit the open position (if he is ahead in development).

**“Not every cramped position indicates that the other side has a better game”** (Mikhail Tchigorin, *The Soviet School of Chess*, Alexander Kotov & Mikhail Yudovich). There are cases when a cramped position is not necessarily bad. **As long as you have some compensation, you might be okay.** Kotov also said something to the effect that terms such as “cramped game” and “free game” are mostly in the minds of theoreticians and have a lot less to do with practical games than is commonly thought.

## ***CENTER***

The center is the most significant area on the board. Try to gain influence



there, get control of it, occupy it, and guard it (support the center effectively with pieces). **Having control of the center confines the opponent's pieces and gives your pieces more freedom.** The advantages from having a strong center are usually long lasting. **"When in doubt, play in the center!"** (Jeremy Silman, *How to Reassess Your Chess*)

**VALUE:** A powerful center can lead to a space advantage for the side that controls it. It sets up an obstacle that divides the opponent's pieces and inhibits their mobilization. That, in turn, reduces their ability to coordinate.

**One of the most important reasons for controlling the center is that it makes it possible for you to move pieces from one side of the board to the other, unobstructed.** Your opponent (who always has to be on guard for a central strike), however, will not be able to maneuver quickly to guard both ranks. That makes it possible for you to control either wing or both wings simultaneously.

**CONTROL:** Having your pawns physically occupying the center does not constitute control. The goal is to be able to safely post pieces on central squares, or to have open lines in the center for your pieces. Having your own pawns in the center hinders your pieces, as an opponent's pawns would do. The reason for getting your own pawns in the center is to battle with the opponent's pawns (otherwise, the opponent's pawns would prevent your pieces from occupying the center). By clearing the center for your pieces (or having your center pawns penetrate into enemy territory), your pieces are more likely to survive in the center.

**WITH:** Having control in the center denies your opponent access to the center, so his pieces will be more passively placed. Therefore, **when you have the better center, you usually should not exchange pieces** because it will tend to unshackle his position.

If you have the better center, you can usually execute some plans automatically (like seizing open files and doubling rooks) with little or no

thought. If you do not have control of the center, those kinds of maneuvers might not be advantageous at the time (since contesting the center is your priority).

If you have control over the center, and your opponent does not have any effective counterplay, there is no rush to start a wing attack. Continue to gain space, stifle your opponent's options, and accumulate small advantages. With a strong center, further small positional advantages usually come your way.

**AGAINST:** If you are behind in the center, challenge your opponent's control. Either you can demolish it or you can tease or force it to advance unfavorably. If it advances, it will create weak squares that you can occupy.

## **SEVENTH RANK**

**METHOD:** The typical method for gaining access to the seventh rank is, first, to get control of an open file for one or both of your rooks. Then make whatever exchanges or decoys are necessary to let the rook get to the seventh rank safely. Then, when the opponent is tied to defending the pawns on the seventh rank, start an offensive on another part of the board. **If the rooks cannot penetrate, it is often worth the sacrifice of the exchange to force penetration.**

**WHY:** On the seventh rank, the rook attacks pawns along the rank. Even in the endgame, there are often pawns on the seventh rank for you to attack. The rook also ties the king down to the back rank or the corner and often becomes part of a mating attack. **An attack that combines a rook on the seventh with pieces from other directions is one of the most difficult attacks to defend.** A rook on the seventh rank also has quick access to the eighth rank. Not only is the threat of a back rank mate always a possibility, but the combined threat of attacks along both ranks allows for many tactics and is often overwhelming for the defender.

**VALUE:** Having a rook well established on the seventh rank can be

worth a pawn or more. A rook permanently entrenched on the seventh rank is frequently as good as a passed pawn. Full control of the seventh rank and possession of advanced passed pawns is usually decisive.

## ***POSITIONAL TENSION***

When pieces or pawns have captures available to them, there is tension until a capture or a move relieves the tension. This tension can be beneficial to one or both of the players. **Keeping the tension (or even increasing it) is usually better than releasing it**, unless analysis suggests a clearly better plan. **By releasing the tension, you lose some of your options.** A tension-releasing move draws an enemy piece closer into your position (which improves the opponent's position).

By keeping some tension into the late middlegame, you might be able to preserve some winning chances when the material is even. Otherwise, without a clear advantage, if the tension is released, the game is likely to simplify into a draw. In open and semi-open positions, it is important to generate some positional tension; otherwise, the game can get uninteresting and lifeless.

## ***OPEN POSITIONS***

**ACTIVITY:** In open positions, there are open files and diagonals and the pieces and pawns are generally free to move. **Open positions favor the side with the better development or the side with more activity (especially if that side has more space as well).** Accordingly, **if you have the better development, you should open up the position.** When you do, opportunities usually arise for the active side.

Space, activity, mobility, development, and coordination all call for an open position. With an open position, the active side will usually find tactical and positional opportunities. In contrast, if your opponent has low mobility

and he is cramped, take your time building your advantage before opening the position.

**VALUE:** Three useable diagonals (for the queen and bishops) are worth a pawn. Open lines and freedom of movement is worth more than most pawn weaknesses (such as an isolated pawn).

**DRAWS:** As wild as they can be, open positions can also be drawish. Often, open lines tend to foster several piece exchanges, which, in turn, can lead to drawish positions.

**PROCEDURE:** Once the position is opened (and you have the space or development advantage), you should attack as soon as possible. Do not allow your opponent to catch up in development and get himself unraveled. **Attacks in open positions are usually carried out with pieces instead of pawns** because of the open spaces and the speed that is possible. **The fight is usually spread over the whole board** (to take advantage of your opponent's low mobility). Usually, he will be forced to make positional compromises or to allow an attack. **The more pawns that are exchanged the less positional and more concrete the game becomes.** So, calculate as many variations as practical. Remember to keep an eye on your opponent's possibilities, too (in open positions developments can happen quickly for either side).

## ***OPEN CENTER***

**If there are no pawns in the center, the pieces play the most important part.** The accent is on swift development and good piece activity. The attacking power of the pieces becomes the main factor in the game. **If the center is open, the active side should try to provoke weaknesses with his pieces, and then attack those weaknesses. Pawn storms are usually ruled out** because they would likely cause weaknesses in your own camp.

The direct conflict, and resulting exchange, of the pieces can lead to large-scale simplification. That simplification can reduce the winning chances for

both sides. So, unless you have a substantial lead in development, it might be best not to open the center or you might risk letting your opponent equalize. If you do have a big lead though, you should strike immediately and open the center before you lose the advantage. The lead in development is temporary. You want to convert it into something more permanent before your opponent can catch up.

## ***CLOSED POSITIONS/CLOSED CENTER***

**POSITIONAL:** Closed positions occur when the pawns are blocked. The pieces have limited mobility because of the blocked pawns. **When the center is closed, and there is no imminent clashing of pieces; think positionally.** In closed positions, positional judgment generally predominates over tactical or concrete thinking. Think in terms of the big picture. Base your plans on broad strategical considerations. **You can usually afford the time to redeploy your pieces to better positions** because time is not as important as in an open position. **It can be a time for slow maneuvering.** This is when positional understanding and experience takes precedence over tactics and calculation.

**PAWN BREAKS:** In a closed position with a locked center, you should try to open lines on the wings with pawn breaks. **The breaks are for the dual purpose of getting your rooks activated and to gain space on the wing on which you plan to invade.** It will be a disadvantage if your opponent accomplishes this before you do. When the center is closed, both sides should **be alert to the possibility of a central strike in answer to activity on a wing.**

**CENTRAL STRIKES:** If timed properly, a tactical advance of a central pawn can have a significant impact on the game. The aim is usually to attack a centralized piece or the opponent's pawn structure in such an aggressive way that it disrupts the position and gives the striker a tactical, positional or psychological edge. A central strike can be used to:

- win material
- improve the center
- keep the opponent from castling
- complicate matters
- favorably resolve or create tension
- gain a tempo

Taking into account that the situation in the center is the basic point of reference for both sides' plans, such a violent mutation is able to force a reassessment of the situation or even fundamentally reshape the position. It has often been observed that after the execution of a central strike, the opponent temporarily lies in a state of shock, as this violent attempt to disturb the existing situation causes immense psychological pressure. (Efstratios Grivas, *Chess College 2: Pawn Play*)

**WINGS:** Since central play is ruled out if the center is closed, play takes place on the wings. First, each side should try to establish pieces on central squares. When you are sufficiently centralized, you should start the play on the wings. Both sides try to open files advantageously on one side of the board.

**Which wing you decide to operate on usually depends on where you have the most space, freedom of movement or control. In other words, play on the wing where you have the advantage.** Since the opening of the wing will come mainly from pawn activity, **the side where you have the advantage is usually where you have the pawn majority or the more advanced or healthier pawns (in other words, the better pawns).** With a closed center, pawn advances on the wing are usually safe (since the king is out of harm's way). Just be sure that the opponent cannot force open the center (the typical counter to a wing attack); otherwise, your king could be in jeopardy.

## ***SEMI-OPEN POSITIONS/CENTER***

In semi-open positions, as with closed positions, you should usually play in the sector where you have a space advantage. As with a closed center, it is also a good idea to centralize some pieces.

A knight in a dominant position can work with a rook better than the combination of bishop and rook. In open positions, though, the knight is usually clumsy when paired with the rook. The bishop (especially when there are open diagonals) makes for a better coupling.

## ***CRITICAL POSITIONS***

In the game, sometimes you calculate and sometimes you operate mostly on general principles. The more experienced the player, the more he uses his experience and general principles together to determine his move selection. Except, when they come to critical positions (critical moments, critical moves, critical points, turning points), they analyze.

A critical position is one of those points in a game where the choice of moves will change the outcome of the game. Experienced players take the time to look at the position with care. They know that estimates or approximations are inadequate and that concrete calculation and objective evaluation are in order. Positional theory alone is insufficient at these junctures.

**When faced with a critical position, you have to calculate variations.** The decision to concentrate on these critical positions more than others is motivated by the feeling that, if we do not handle the game properly at this point, we might be making a serious (if not decisive) mistake. At a minimum, the decision will have a large impact on the overall game result.

At these times, the strong player will spend a lot of time, since he will plan or re-plan the course of the rest of the game at this point. "Sometimes in a game a critical moment arises. If you rush by it, and do not find the precise

move, the game can alter course and begin to go downhill” (Evgeny Bareev, *Positional Play, Middlegame*, Mark Dvoretsky & Artur Yusupov).

Often, a critical position, especially one occurring during an attack, can be so critical that any hesitation will lead to the loss of the initiative (which would have a detrimental impact on the outcome of the game). This has been called a “crisis.” Being able to recognize a crisis in the game is one of the most important skills to have as a chess player. One of the main settings for a crisis is during a mutual attack. **When both players are preoccupied with their own attacks, a crisis can easily occur.**

In some kinds of positions, where you have a clear positional edge, if you miss a strong plan but maintain control there is a good chance that you will get further opportunities. However, if you are on the defending side, you may get only one chance to equalize. In sharp double-edged positions too, you might only get “one shot” and if you “blow it” then you could easily lose. Getting the “nose” to detect that there is “something in the air” is a big asset for a player. (Chris Baker, *Learn From Your Chess Mistakes*)

**RECOGNIZING:** It is not always difficult to find critical positions; the talent lies in knowing when to look for one. **Some situations that are (or might be) critical moments are when:**

- The position changes from a win to a loss or a draw.
- An exchange is possible or has been made (especially involving queens).
- A change in the pawn structure (especially in the center) is possible or has been made (such as relieving the central tension).
- Tactical complications arise.
- Deciding where to put your king.
- A position occurs that results from a series of forced moves.
- In the opening when you run out of “book” moves.



- The game transitions from opening to middlegame or from middlegame to endgame.
- An important strategical decision is being made.
- Deciding whether to reduce an endgame to a king and pawn ending.
- You have a temporary advantage that you want to convert into a permanent one before it is too late.
- You are contemplating a decisive move.
- Your pieces are ideally placed and there is no way to improve them statically.
- You think you understand your opponent's plans.
- The position is opened up.
- It is time to form a new plan.
- There are many options on the board.
- You are contemplating a sacrifice or an attack.
- A sacrifice has been made by you or your opponent.
- A surprising or unusual move is made by your opponent.
- A tactic becomes available.
- You see a move that looks like it might win.
- When the course of the game changes completely.
- If your opponent spends a long time on a move and then plays something unexpected.

## ***FORTRESSES***

Usually an endgame position, a fortress is a barricade that prevents a player's opponent from penetrating or making progress. It is something to hide behind when at a disadvantage. It can be made of pawns, pieces or the combination of the two.

Sometimes, you can erect an impregnable barrier that prevents a queen from being able to defeat a rook and minor piece. Sometimes, even a rook can

draw against a queen by using a fortress. One setup would be that the rook and pawns protect each other (with the help of the king), the rook prevents the white king from penetrating (and the rook is unassailable by the white pawns) and the black king has adequate protection. In a situation like this, the queen would need to be sacrificed in order to make progress (which would probably result in a decisive advantage for black). An example of such a position would be white pawns at f4 and h4, Kg3, Qe3, black pawns at e6, f7, g6, Kg7, Rf5

Bishops can sometimes create a fortress in cooperation with pawns that prevents the passing of a hostile pawn. A fortress is possible with a rook and pawn vs. queen if the pawn is on its original square and the pawn is not a rook-pawn.

It is also possible to set up a fortress with a pawn on g3, the king on g2 and a rook on f4. You can erect another type of fortress with a pawn on g4, a rook on f5 and the king on g3 or g5.

In order to break through a fortress you need to disrupt the coordination of the pieces and pawns in some way. Usually, this is done by way of a sacrifice. Fortresses are rarely effective in the middlegame, but they can be effective in the endgame.

## ***KING SAFETY***

King safety is crucial. It is not a good idea to have the king on a diagonal against an opposing bishop or without an escape from a back-rank mate. An escape square at g2 or h2 is often a good preventive measure. Of course, if these escape squares allow enemy access to your king you should avoid them. Although, if your opponent cannot exploit these weaknesses and they allow you to attack; you should probably play them. Be sure that your king is safe before embarking on an aggressive attack. That will give your opponent a lot less chance of effective counterplay.

## ***KING POSITION***

**IMPORTANCE:** In the middlegame, the relative king placement is even more important than the pawn structure. If the king placement (and material balance) is about equal, then (and only then) can other factors take on a more important role.

**KING IN CENTER:** If your king is still in the center, you should not open up the position or open any new lines. The king will probably be in the sights of the major pieces and you should move it out of the center as quickly as possible. **It is usually worth at least a pawn to keep your opponent's king stranded in the center** (by preventing him from castling).

**PROTECTION:** Usually, **the best way to keep your king safe is to maintain the original placement of the three pawns in front of your castled king.** This represents the maximum guarding ability of the third rank by the pawns. The pawns are also guarded by the king and they are as far away from the opponent's pieces as possible. As soon as one or more of these pawns move, weaknesses are created. The moved pawns leave holes in their wake and they can become targets. Only make pawn moves in front of your castled king if necessary. **If you have to move one of these pawns, move it to a square that is the color of your opponent's attacking bishop.**

Other positional considerations that can help your king's safety are:

- having a strong center
- possessing a much stronger position than your opponent
- being well-developed
- having some pieces in the vicinity of the king for defense

When guarding the king be careful that you do not immobilize it. That could simplify an opponent's attack.

**MOVING:** Other than for safety, moving your king to improve its position

is a luxury. You should only move it when you have a long-term advantage and your opponent has no counterplay.

**IN OPEN:** If the king is going to be safe out in the open, the opponent must have no prospects of mounting an attack on it (or you must have a big enough material superiority to counter an attack).

## ***COUNTERPLAY***

**YOURS:** Passive play is not a good idea against aggressive and resourceful players. **If your opponent is taking chances, you should employ firm, positionally sound, and aggressive counterplay.**

In dull or drawish positions, the first player to get aggressive might put the other in a permanently passive position. In that event, the game could become decisive. That means it could well be worth a sacrifice of some material to break out of the deadlock.

**OPPONENT'S:** Do not allow any counterplay on your opponent's part if you have a won game. Do not risk the win by letting him get something started. Take the time to prevent it.

Because you have an advantage on one side of the board does not mean that your opponent should have counterplay on the other. You should control both sides.

Sometimes, you can intentionally give your opponent some counterplay to avoid a draw. You can also give him some counterplay if it is the only way that you can get a decisive attack of your own started. In other words, **to play for a win, you might need to give your opponent some counterplay.**

## ***TIME/TEMPO***

**IMPORTANCE:** Time can drastically alter the assessment of a position. Do not waste it. Letting an opponent defend material loses time for him (which

gains time for you). A strong player will often forego the win of material in order to save time, especially if he can use the time in an attack. An extra pawn is not significant until the endgame (which might not even come), but a positional advantage is useful in all stages of the game.

Most of the time, tempo is an extremely important element in chess (for example, in a sharp mutual attacking situation), but it can be relatively insignificant (for example, in some quiet closed positions).

The importance of tempo is easily demonstrated by the observation that many grandmasters will not try to win right away with black. The reason is the difference of the one tempo of the first move.

**VALUE:** The value of a tempo is high in the opening and can be high during an attack, but, usually, it decreases as the game goes on. It can even approach zero. That means that you should delay some moves, such as a prophylactic h3 or a3, or the redeployment of a developed piece, until development is complete or the position quiets down.

Material is less important than time in an attack on the opponent's king. You generally have to sacrifice time in order to gain space.

**Advantages in time and space are temporary; they will evaporate. You need to exploit them quickly.**

**One way to gain time is to prevent your opponent from gaining tempos off your pieces.** "Chess is a tragedy of one tempo. One is always short of it, either for a win, or a draw" (Tartakower).

"Timing embraces the management of the clock and also the rhythm of the game. You must learn to dictate the tempo, to disturb your opponent's rhythm and to make him waste valuable time" (Michael J. Gelb & Raymond Keene, *Samurai Chess*).

## **MANEUVERING**

The idea of maneuvering is to try to improve your position while, at the

same time, trying to limit your opponent's possibilities.

**WHEN:** The time for maneuvering is when:

- The position is balanced (even, level).
- Time is not significant.
- Your opponent has no counterplay.
- There appears to be nothing to do.
- Neither side has any direct threats or an obvious plan.

**WHY:** Maneuver to provoke weaknesses or bad moves from your opponent and to achieve a positional advantage. Maneuver to improve the placement of your pieces. Redeploy your pieces to increase their activity and to improve their coordination. "One of the benefits of a flexible, maneuvering middlegame is that it may provoke bad, forcing moves from an anxious opponent" (Andrew Soltis, *Opening Ideas and Analysis For Advanced Players*).

**METHOD:** Trying to maneuver against an active opponent is impractical. You have to quiet his game down first.

Find your worst placed piece and improve its position or exchange it off. Often the best way to improve your position is by activating either your worst piece or the piece that you can improve the most. **Make all the moves that strengthen your position first before making any aggressive moves.**

Patience and restraint are important in maneuvering situations. Aggressive, offensive moves are not part of a maneuvering game, nor are long-range plans. The general theme is moving here and there, back and forth, often with many changes of short-range plans and sometimes marking time. Sometimes, even the king can kill time by moving back and forth.

Sly, crafty moves that disguise your intentions are best. In maneuvering situations, making transparent moves can help the opponent; because, then, he will have a better idea of what your plans are. You should make the necessary

positional moves first, and save the most committal ones until last.

If all of your pieces are on their optimum posts and you cannot improve their placement, sometimes a pawn move is in order. The best pawn structure can often determine who is better in a maneuvering game. Sometimes, even a retreating move can be effective. Do not be afraid to admit that your move was a mistake. Move it again if necessary.

If you are playing a player who plays actively (always looking for the most active moves), playing a slow maneuvering game can be the correct strategy for you. By playing solidly (not creating any targets, playing normal moves, and more or less waiting for your opponent to force the issue), an opportunity might materialize for you, or your opponent might very well self-destruct by trying too hard to squeeze something out of nothing.

## ***WAITING MOVES***

There are positions in chess which are unimprovable, and at the same time tenable—positions in which the best play for both sides is to maintain the status quo, and where if either party assumes the initiative he should suffer for it, although it may happen to be less risky for one than the other. (Cecil Purdy, *the Search for Chess Perfection II*)

Sometimes, the best way to obtain an advantage is to make quiet waiting moves that gradually build your position. **In those positions where your opponent cannot improve his position, you should make some waiting moves to allow your opponent to declare his intentions or to self-destruct.** If the position is unclear, make noncommittal moves that disguise your intentions. Strong players are able to hold back when it is called for.

**If you have the opportunity, you should usually force your opponent to repeat a position. It is good psychology and gains a little time.**

## ***PASSIVE PLAY***

There can be a fine line between a waiting move and a passive move. Even a waiting move should not be passive. **Do not make a move without purpose with the idea that a plan will come to you later.** Every move counts and should have a point. If nothing else, it should improve the position in some way. Do not play passively and without a plan. Even if you do not make any mistakes, you will lose if you play passively without a plan.

## ***IMBALANCES***

You can exploit every difference between one of your pieces and your opponent's counterpart of that piece. For example, if your bishop is better than his is, you can use that imbalance to your advantage. Imbalances can exist with material as well as with positional factors. Imbalances add interest to the game and often make evaluations more difficult.

In positions where there is a material imbalance, each exchange has more significance because the relative value of each piece is more important than its absolute value.

**EXAMPLES:** The most common material imbalance is bishop vs. knight. Examples of where some other imbalances might exist include:

- the pawn structure
- the initiative
- superior minor piece
- space
- development
- good vs. bad bishop
- control of key squares
- control of a file



- queen vs. three pieces
- active rook vs. passive rook
- bishop pair vs. bishop and knight (or two knights)
- queen vs. two rooks
- queen and knight vs. two rooks and a bishop

**DO:** When you have an imbalance, do what the imbalance dictates. For example, if you have a bishop vs. a knight, open the diagonals and aim for an endgame with pawns on both sides of the board. Make every move with your imbalance in mind.

**If you are winning, a balanced position is better for you than an imbalanced one.** If the game is even, and you are playing for a win, an imbalanced position will give you better chances (and your opponent, as well). **If you already have an imbalance, and you are contemplating creating another one, make sure they are compatible.** For example, closing the position might give you a structural advantage, but, if you have bishops vs. knights, it might not be a good idea.

**An imbalance is a double-edged sword** (both sides have advantages and disadvantages). With an imbalance, both sides gain opportunities for creativity and for blunders. You need to exploit your advantages before the other guy exploits his... Otherwise, he will.

## ***OPTIONS/FLEXIBILITY***

In the opening, it is a good idea to save as many options as practical (while observing the general ideas of opening principles), rather than committing to any particular action. Aim for the highest flexibility. This means using the move order that allows you to reach the desired position with good choices on how to continue. Throughout the game, flexibility remains equally important.

Maintain your options. Have alternate ideas. Do not absorb yourself with

one part of the board or one kind of advantage. Remember Nimzovich, when he said, “In a sound position there are at least two alternatives that are ‘the only move.’”

## **PROPHYLAXIS**

Prophylaxis is fundamental to positional play. The idea is to prevent the opponent from making constructive moves and executing his ideas.

Nimzovich was a big believer in prophylaxis. It was one of the key components of his system of play.

**If you can prevent the opponent from executing his plan before you continue with yours, it is often a good idea.** If you can stop him permanently, then it is usually a good idea to take the time to do it. That will give you more time later to develop your own play.

Think about what your opponent is trying to achieve and what you would play if you had his position. Try to visualize where he should position his pieces, and then try to upset the implementation of that position. Start by preventing the most dangerous of his moves or plans. **By restricting your opponent’s pieces, you will automatically be increasing the effectiveness of your own.** Reducing the effectiveness of one of your opponent’s pieces might be enough to win a game.

Do not think that prophylaxis is passivity. Based on a realistic assessment of your possibilities and your opponent’s, it is a measure aimed at preventing your opponent from improving his position while, at the same time, allowing your game to proceed favorably.

**Having well-coordinated pieces is a form of prophylaxis, because, when your pieces are working well together, they can usually stop any kind of offensive operation from your opponent.** Prophylaxis is also a good psychological weapon because it can induce your opponent into playing carelessly, since quiet play frequently causes an opponent to become reckless.

**It may well be more important to disturb your opponent's strategy than to preoccupy yourself with your own.**

Another form of prophylaxis is to **strengthen the defense of any weaknesses that you might have**. This will remove, in advance, any potential tactical surprises that might otherwise have happened later.

In sharp conflicts, you might decide not to deal with prophylaxis at all and charge ahead with your own plans, leaving the opponent to proceed with his. Of course, you should only do this when you see a clear benefit.

## **OVER-PROTECTION**

Based on Steinitz's teachings, Nimzovich popularized the idea of over-protection. The assertion is that strong points are the hub from which attacks and threats emanate. If more pieces defend the strong point square than attack it, it is over-protected.

**The point of over-protection is that when a point is over-protected, you are free to use all of the defending pieces, individually, for some other purpose** (because if one piece moves, enough pieces will remain to defend the square). **Therefore, all of the pieces that are involved in the over-protection have flexibility.** Whereas, if equal numbers of pieces were defending a strong point, they would all be tied to the defense and, therefore, all of the pieces would be inflexible. If a capture takes place when a square is over-protected, there is a choice of which way to recapture. Over-protection, as an end in itself, did not attain extensive popularity.

"Only strong points which are positionally important, and not weak points, are to be over-protected. Furthermore, it is desirable that the points concerned should be, to an extent, an object of contention" (Aaron Nimzovich, *Chess Praxis*). Over-protecting weak points is rarely a good idea. Ordinary weak points should never be over-protected since that could lead to a passive position. However, it is reasonable to over-protect weak pawns that are at the

base of an important pawn-chain or other strategically important squares.

## **THREATS**

You can aim threats directly at checkmate or they can be positional in nature. They can be tactical or strategic. They can be indirect or potential. Almost all of the moves that we make to accomplish our goals are, in one way or another, in the form of a threat. Threats are one of the best resources for maintaining or increasing an advantage. You cannot make progress in chess without making threats (other than by placing your opponent in zugzwang).

**RESPONSE:** “Whenever possible, answer a threat with an equal or stronger threat. The best defense is attack” (Larry Evans, *Chess Catechism*). **Deal with threats.** Do not hesitate to deal with (or at least consider) all of your opponent’s threats. Even if you are absolutely winning, be on the alert for possible counterplay by your opponent. Even when a threat is indirect (such as when a piece is put on the same line as your king or queen), **it is usually a good idea to remove the threat** by moving your piece or removing the opponent’s piece that is doing the threatening.

When your opponent makes a threat, check (at the end of the ensuing variation) to see if you have a forcing move that reverses the threat in your favor. Maybe you can let him carry out his plan.

Threats are often missed. It is generally thought that if a player does not see a threat pretty much at once, he will miss it altogether (even if he continues to analyze for 20 minutes or so).

**EXECUTION: A threat is often stronger than its execution.** The threatened player has to keep material at the ready to defend against the threat, which means he might not be ready or able to defend against an additional threat elsewhere.

Even a threat that is irrelevant, if it lingers long enough, can start to bother the defender. He is forced to consider it continually and to wonder

when you are going to execute it. That causes the defender to agonize about it on each move, affecting his plans, consuming time and wearing him out. This can easily lead to the making of mistakes. It can cause him to fixate on the threat, which can cause him to miss another threat. As a result, you should not execute the threat until you are going to gain something immediately. After the threat is executed, he is free to go about his own plans. “To carry out the attack sometimes means untying the opponent’s hands, enabling him to take concrete defensive measures or even to disregard the attacked object” (Yefim Geller, *The Application of Chess Theory*).

**MAKING:** By making threats, you can distract an opponent from the defense of your main attacking plan. **It is always a good idea to threaten something.** Be sure that you do not allow your opponent to improve his position by meeting your threat though. You want to be sure that the move improves your position (not his), no matter what response he makes.

Defensively, if you are at a strategic disadvantage, under an attack that you cannot adequately defend, or even dead lost, it can sometimes pay to threaten your opponent’s king. Even if your threat is a superficial attack, it can possibly cause him to make a mistake.

**TWO THREATS:** Winning at chess can be the result of learning how to create more than one threat at a time. Knowing how to create several threats at once is a big asset. “The idea of creating two simultaneous threats will serve as a starting point for us in understanding the process of forming a plan” (Alexei Kosikov, *Positional Play, Middlegame*, Mark Dvoretsky & Artur Yusupov).

# STRATEGICAL

*It would be an exaggeration to say that the master strategist is always more than a match for the attacking player. But how the latter can be made to look helpless!*

**—Irving Chernev, *The Most Instructive Games of Chess Ever Played***

## PLANNING

**IMPORTANCE:** It has been said that a plan is so important that even a bad plan is better than no plan at all. This, of course, is an exaggeration. The point is that it is important to have a plan, almost any plan. **A good plan can rescue you from a bad situation, while a bad plan can ruin a good game. It is equally necessary to have a sound plan for a decisive attack as it is for an accurate defense.**

It would be an exaggeration to say that strategy is generally more important than tactics, but it undoubtedly can be at certain times. It is good to devote ample time towards developing a solid plan. Just reacting to threats after each move and waiting for something to take place is a recipe for disaster. That would be like a pool player not planning his shots several moves in advance... such a player would be beaten almost every time by the player who does.

Aside from the benefit of reducing uncertainty from your move selection, another benefit to having a plan is that it saves you time. Having a plan makes it easier and faster for you to find better moves.

**TERM:** Plans are usually made for just a few moves at a time. Try to stick with your plans as much as possible (despite tempting alternatives), while remaining flexible. **The whole game should consist of a series of short-term plans united by a general grand strategic plan, which, in turn, is**

generally decided by the opening you have played. Modify your plans as needed, or modify them if it is suddenly advantageous for you to do so.

## ***THE PLAN***

A myth persists (probably initiated by some old books) that masters create a grand plan from the first moves of the game and carry it out until the end of the game. Barring an extremely rare game, this is not true. In fact, it would not be possible since the master cannot know, in advance, what his opponent is going to do.

**Always have a general plan. It is your compass.** A consistent plan should be a higher priority than haphazard material grabbing. Although, if your opponent hangs his queen or allows mate, do not pass it up just to carry out your plan.

The plan does not need to be intricate or detailed. It can be as simple as to finish development or to maneuver to an outpost. The plan can be to attain a small positional advantage (such as destroying your opponent's pawn structure, exchanging one of your opponent's strong pieces, or activating a piece). Regardless of its complexity, you should always have an objective and a plan on how to get there.

## ***WHEN TO PLAN***

Planning is constant throughout the game. Start making your plans early in the game. **Do some planning as the opening is in progress.** For example, thinking about development alone can easily lead to a cramped or passive position. There are some positions that may lack a clear character, which makes it difficult to devise a plan. Sometimes, you have to decide between two or more plans. At other times, you have to postpone making a choice. At least have the idea of devising a plan on your mind early in the game.

**After the opening, spend some time making a plan for the middlegame.** Think first of who has the long-term prospects. The prospects will usually be based on the particular opening that has been played. For example, some openings give one side a long-term advantage while offering the other side short-term possibilities. One side might need to simplify; the other side might need to mix it up. Once you know whether your chances lie with the long or the short term, you can begin to plan. Choose a clear-cut strategic direction for the rest of the game and plan accordingly. You will make many mini-plans along the way and you will probably change plans several times during the course of the game.

**The plan is always of less importance, and it is less pressing, than any tactical opportunities or threats that pop up.** Think of the plan as a contingency in the event there are no beneficial combinations available to either side (**tactics are what you do when there is something to do and planning is what you do the rest of the time**). Frequently, positions do not seem to contain moves that immediately stand out as candidate moves. **This is when you need to plan.**

Ideally, every move of the game should fit into an explicit plan. But, there may be times when there is nothing to do; times when you cannot formulate a plan because there are no obvious static or dynamic features at the heart of the position that indicate a course of action. In these rare cases, you should make a move in accordance with general principles or with the idea of creating a tactical opportunity. There are even some situations where it is advisable to do little or nothing. For example, if any sensible move weakens your position or you think your opponent is about to create a weakness, then it might be best to make a waiting move and formulate a new plan after you see your opponent's reply.

Popular opinion holds that you have to do something ("better a bad plan than no plan at all"). Yet, there are situations in which it is advisable to do



nothing. If you have reason to believe that your opponent is about to do your job for you, stay aside. In a position in which it is difficult to find reasonable moves, there is a good chance that your rival will make unreasonable ones. In such a case, your best bet is to await events and let him dig his own grave. (Amatzia Avni, Practical Chess Psychology)

## ***LOGIC OF PLAN***

**A plan is made up of ideas, not moves. There are no laws for making plans and no way to prove a plan's soundness. You must base the plan on experience, principles, and the individual position.**

Make your plan based on the position. **You need to do what the position calls for. You cannot force your will on the position.** If it is a stable position, you cannot force a tactical outburst out of thin air. The elements must be in place first. Any attempt to force the position to do what you want it to do must fail.

The character of the position will suggest a method for developing the plan. In a slow, maneuvering, closed game, you are not likely to be calculating combinations. In those kinds of positions, make your plan as specific as possible. In contrast, if you are in a tactical setting, or need to attack or defend, support the plan with concrete calculations.

**The larger your advantage in a given position, the larger you should make your goals.** If you have a small advantage (or no advantage), you are not in a position to look for a decisive plan. On the other hand, if you have a large advantage, look for a winning idea.

**The pawn structure is an important factor in providing ideas for a plan. It almost dictates what the plan should be.**

## ***HOW TO PLAN***

**ASSESSMENT:** The first step in planning is to assess the current position objectively. This is the hardest part of the process. If this assessment is inaccurate, your plan will probably be bad. The pawn structure is a big factor. Also, consider:

- direct threats
- sacrifices
- king safety
- imbalances
- loose pieces
- piece coordination
- piece activity
- critical squares
- outposts
- strengths and weaknesses in the position for both sides

Look for familiar strategic, tactical or technical motifs in the position. If the pawn structure is familiar to you, that should give you a strong indication of the proper course to take. **Plans are largely based on the pawn structure.**

**It is important to try to determine where your opponent has gone wrong. No plan can succeed if your opponent has not, or does not make mistakes.** Have you made mistakes? Maybe you need to defend.

Try to understand the spirit of the position. What is going on? What is it all about?

**GOALS:** Setting a goal is the second part of planning (since, without a goal, you will have no idea what you should do next, let alone a few moves down the line). You need a goal in order to evaluate your variations. Your structure and your pieces should all work towards this particular goal. That goal could be something like:

- to gain material
- to increase a positional advantage
- to harmonize your pieces
- to equalize
- to defend or strengthen a decisive attack
- to change an unfamiliar position into one that you understand

Try to imagine a similar, but stronger, position than the one you have. **Set an achievable goal based on the realities of the position.** At the same time, try to identify your opponent's goals.

**CREATE PLAN: A plan consists of just a few moves; it is not for the whole game. The lengthier the plan, the greater is the inherent risk.** In the early middlegame, the job of creating the plan is made easier if you are familiar with the opening system that you are playing. Many times the choice of a plan is made easier by knowing typical strategies for some of the basic chess positions (for example, opposite-side castling, various imbalances, the direction pawns point, and IQP's).

**If you have a choice between two good plans, but one is simple and the other is complicated—choose the simple one.** The plan should be the simplest way to get from the current position to the goal (playing for a brilliancy is not usually a sound idea). “Any time there is a clear path ahead, travel down it without getting distracted by irrelevancies, and you will reach your goal” (Peter Kurzdorfer, *The Tao of Chess*).

Base your plan on the pawn structure and the strengths and weaknesses in the current position (the nature of the position). See if there is a way to get from the existing position to one of the goals. Build your plan around the goal.

**If a move looks bad on general principles, the plan is probably bad.** So, if your plan calls for an anti-positional move or something that does not “feel” right, reconsider the plan. An exception would be a forced combination that leads to an advantage for you.

In every position, there are many possible plans, and usually no one can say for sure which one is the absolute best. The plan must be achievable and beneficial. Be confident that the plan can be carried out.

A plan does not involve calculation. It is not a move or a series of moves. It is a verbal generalization. “Consider that you have a plan only when you can formulate it in words in your mind. Otherwise there is no plan” (Alexander Kotov, *Play Like a Grandmaster*). **Be sure to be able to put the goal and the plan into words. It is not a plan if you cannot articulate it.**

For the average player, the plan should usually be as short-range as possible. The idea of the plan is to project the position on the board into a better one a few moves ahead. In the beginning, do not even consider your opponent’s replies.

**TIME:** It is important not to hurry to win. Do not take risky shortcuts. Take your time.

“Creating a plan typically takes longer than selecting any of the succeeding moves which support that plan” (Rolf Wetzell, *Chess Master, at any age*). On the other hand, looking for the perfect plan will lead, of course, to disaster. You will simply run out of time. **“An imperfect plan implemented immediately and violently will always succeed better than a perfect plan”** (General George S. Patton).

## ***IMPLEMENTING PLAN***

When you come up with a plan, be sure your method of realizing it is not tactically flawed. When possible, **disguise your plans by playing the least committal moves first** (this goes back to principles of ancient warfare). Make sure each move fits the overall plan. When your opponent does not know what your plan is, it makes him anxious and indecisive. Concealing your plans and instilling flexibility in your moves, especially in the opening, can give you an advantage.

Once you have a plan, you should carry it out right away. Do not waste time with unnecessary preparatory moves, especially in open positions. Follow the plan consistently.

Remember to consider your opponent's plans too. You should try to stifle his plans while simultaneously implementing yours.

## ***NEW PLAN***

Do not change plans without a good reason. Planning can be time-consuming and tedious. From a practical point of view, numerous changes of plans can cause fatigue and time-trouble. There is a Russian proverb you hear chess players saying all the time, “**He who says ‘A’ must say ‘B.’**” The meaning of the adage is: once you have started a sequence of events, such as a combination or a strategy, you should follow through.

Still, be fully ready to change plans if the situation demands it. Staying with a bad plan too long is no better than abandoning a good one too soon. Every move changes the position and new evaluations are a continuous process. If developments dictate a change of plans, be flexible. Do it.

Sometimes, a plan fails, or you decide it is not workable; then you have to make a new one. Additionally, when a plan comes to a successful conclusion, a new plan is called for. For example, suppose your plan was to post a knight on a certain outpost. Having achieved that, you should make a new plan.

If your opponent makes a threat, initiates a combination, forces you out of your plan, creates an opportunity or does anything surprising... you need to make a new plan. Sometimes, if your opponent has a bad position, he will be able to prevent one plan, but it might be at the price of permitting another one. In such a case, you should look for that other plan.

## ***IDEAS***

Chess is a game of ideas. Ideas do not have to be original and they do not come from logic. Most often, they come from knowledge or experience. Sometimes, in simple positions, an understanding of the nature of the position is easy to grasp. In positions that are more complex, an idea of how to proceed is necessary.

Inexperienced players have less knowledge so their ideas are often completely original (out of necessity). As we gain experience, we learn and retain more knowledge. We more often rely on this bank of information for ideas. This knowledge, though, can sometimes sidetrack us from a fresh approach. So, be careful.

No human being, and possibly no computer, will ever be able to perceive all of the ideas that exist in a certain position. That also means that **your opponent will always miss some ideas. It is up to you to spot what he has missed. The best source of ideas in the game of chess can be in the evaluation of the inaccuracies in your opponent's play.** To paraphrase Tarrasch: if you do not have an idea, wait for your opponent to get one—it is bound to be wrong.

Creativity in chess (as in most pursuits) is based on thinking in non-routine ways (or outside the box). Sometimes, good ideas are only discovered after normal solutions to a problem fail. Even bad ideas can sometimes generate good ones. An idea is likely to be good if it solves the problem in the position or it is in line with the strategic requirements of the position.

**If an idea does not work, do not just jump to the next idea. Instead, be sure to determine the reason the idea does not work. Maybe there is a fix.**

When you have no ideas, try to imagine the exchange of a pair of pieces, the resulting position might give you an idea. Consider exchanging the opponent's best piece. Another suggestion is to look at the opponent's weak squares for an inspiration.

## **COMPLICATIONS**

Do not enter into unnecessary complications if you can simply improve your position when your opponent is not able to do so. **Complications favor the side that is losing.** If you are winning, keep the play simple, avoid unnecessary complications and do not give your opponent any counterplay. On the other hand, if you are losing, you might be able to turn the game around by complicating the position (your aim is to confuse your opponent). Make the game as chaotic as you can.

**The side with a positional advantage has no need to complicate.** In fact, he should try for maximum clarity. If the complications are favorable to you though, you must not reject them (that will usually lead to the loss of the initiative and the deterioration of your game).

If you are the more the skilful player and you stand to get an inferior position if you do not go in for complications, then you might as well go in for them. You have little to lose and a chance to outplay your opponent in the complications. **Any imbalance, such as one created by a reasonable gambit, should give the stronger player an edge.** Do not become carried away though (a position that is too complicated can create random chances where either side can win).

If you are playing a stronger opponent, complications can be beneficial to you. You probably cannot win by playing cautiously. If you try to complicate the position, you might be able to take advantage of his overconfidence. Besides, he will not want to take the risk of playing an unnecessarily complicated game with you. He wants a simple technical game against a weaker player.

## **TYPICAL PLANS**

**If you have a space advantage and a strong center, the standard plan**

**is to start a pawn storm on the side of the board where you have the advantage. Then, bring in the minor pieces to force weaknesses.**

If your plan involves the opening of a file, you should assess how the heavy pieces will perform on the file. Will they be able to penetrate? Will your opponent swap them off? Will they have a safe outpost on the rank?

Bishops do best in open positions. So, **if you have the bishop pair, open the game.**

If your opponent has a misplaced piece, make a plan to capitalize on its misfortune. You can go directly after the piece, attack the piece or pawn that defends it, prevent it from improving its position, or start an offensive on the other side of the board.

**If one of your opponent's pieces is cut off from play, change over to the other side of the board and start an offensive.** You will be, in effect, up a piece in that area.

**Tie your opponent down to defending one side of the board, then switch over and break through on the other side.** You will be up material where it counts.

If your opponent has no threats and you cannot improve the position of any of your pieces, attack a target, exchange his best piece (or your worst one) or gain space. Look for weaknesses and opportunities.

Capa endeavored to exchange one of his bishops so that he knew on which squares his pawns should be, he then swapped off a rook and the problem of deciding which rook should go to d1 would disappear, after this it remained for him to exchange a knight, so that he would not need to rack his brains deciding which knight should control the weak square in the center. This is of course, an exaggeration, but the components of such strategy in Capablanca's play are overlooked. (*Secrets of Chess Intuition*, Alexander Beliavsky & Adrian Mikhalechishin)



## ***OPPONENT'S PLAN***

Do not preoccupy yourself so much with your own plans that you forget to consider your opponent's plan. The easiest way to avoid making this mistake is to ask yourself immediately after each of your opponent's moves, why he made the move he did, what it threatens, and what weaknesses it caused.

If you are completely wrapped up in your own plans, you are bound to underestimate your opponent's plans. The more alert you are to what is going on in your opponent's mind, the better chance you will have to avoid his traps and schemes.

The object is to hide your intentions and to guess those of your opponent. Accordingly, you must devote some time to considering his plans as well as your own. As Reti once said, **"One should be wary of easily understandable moves."**

## MOVE SELECTION

*Maxims about quick development, and all other maxims in chess, are valuable labor-saving devices for avoiding bad moves rather than for finding good ones.*

—Cecil Purdy, *The Search for Chess Perfection II*

### **BEST MOVE**

According to Kuhn's Theorem (of game theory), a system called the "rollback procedure" is guaranteed to find the correct way to play any "finite, deterministic, sequential, noncooperative game of perfect information." The "rollback procedure" is, basically, a method of starting with the last move of a game and working backwards to the beginning, in order to find all of the best moves leading to the win. According to game theory, chess is a finite, deterministic, sequential, noncooperative game of perfect information. Therefore, according to game theory, there is a best way to play chess. Of course, because of the enormous number of possibilities, no one really expects ever to find out what it is.

Tarrasch believed that there was usually only one correct move in a position. The position was a problem, and the solution was to find the correct move. Lasker felt that whenever you found a strong move there was an even stronger one available in the position. So, according to Lasker, do not settle for a good move, look for an even stronger one.

**If you see a move that looks strong, but is not possible to play, spend a little time trying to make it work.** Usually, you will find a refutation to the move, but a deeper look might uncover a way to make it possible.

Just before the turn of this century, World Champion Emanuel Lasker published a book, *Common Sense in Chess*, in which he propounded a new

philosophy of chess. He argued that chess was neither a game nor a science nor an art, as had been thought at various times in its long history, but a fight. There can be but one objective in a fight, Lasker Wrote: winning. What does it matter, in the heat of battle, whether or not a plan is theoretically sound? Simply put, if it works, it's good; if it doesn't, it isn't. (Pal Benko & Burt Hochberg, *Winning with Chess Psychology*)

**Usually, more than one move is equally the best in any given position. Most of the time there are at least a few good moves available.** Chess is too complicated to have a single best move in every position. There are too many lines, too many strategies, and too many styles to allow it. There is also your clock and your opponent's clock to contend with, your position in a tournament, the time controls, and psychological factors that play a part in move selection. Kasparov compared chess to music and mathematics. He said that chess was more like music, because in mathematics there is only one correct answer.

**Trying to play the best move and playing to win are not the same.** Playing to win includes psychology, the strengths and weaknesses of your opponent (as well as your own) and match or tournament circumstances. Another important concept in your search for a good move is just being sure not to play a bad move.

Play the board, not the opponent. A good move is a good move no matter how strong your opponent is or what your opponent's personality is like. Analyze objectively and play the best move you can. Do not play a move if you know it is weak or not in the character of the position.

To find the best move, accurately analyze all of the pertinent variations that you can with the most economical use of your time. **Playing the best move may not be as important as the time that is lost trying to find it.** Do not base the choice of moves on a precise judgment of the last position you can visualize. Rather, base your choice of moves on whether your position has

improved or gotten worse because of the move.

“Natural’ moves are not always the best” (Paul Keres, *The Complete Games of Paul Keres*). Natural moves may not always be the best moves, but they can be a guide. For example, if your opponent plays a4, frequently a good reply is ...a5 (because he is usually threatening a5 or b4), but in some positions this would be a mistake. **If the move feels wrong, it usually is.** If you want to play a move for positional reasons, it will probably be good tactically, too. **Odd-looking** moves can lead to trouble. Be careful when considering a move that seems unnatural. Still, do not make a natural-looking move without critical evaluation.

You must analyze every move. **Do not ever play a fast mechanical move. There are no obvious moves for stronger players.** The move must fit the plan and not allow an unfavorable tactical or positional reply. Obtaining an advantage without risk is better than playing a brilliancy without a valid basis. Small details are important in chess.

The initiative and the activity of the pieces are both more important than material gain. When evaluating a position, consider the activity of the material more than just the material count. **The overall activity of all of the pieces will usually suggest where to look for the right move.**

**Very often, the best move is the move that gets a piece into the game that is not yet contributing.** Another case for the best move is the move that improves your position the most.

If you have a choice between a clear variation and an attractive one that is hard to evaluate, go with the clear one. If you are unsure, pick the clearest variation that gives you an advantage and play it.

Sometimes, the best move is the move that is the most unpleasant for your opponent. “It is normally best to play practical moves which create as many problems for the opponent as possible” (Simon Williams, *How to Crush Your Chess Opponents*).

## **CHOICES**

When you have a choice between what seems to be equally good moves, **play the most necessary move first. When in doubt, move a piece, not a pawn.** If you know you are going to play two moves, play the one with the more immediate effect first. If in doubt, **play the least committal move first.** If you are sure where one piece needs to go, but not the other, **play the one you are most sure of first.** If it is a tossup between two moves, play the **most active one first.** Do not postpone a move that you should play if it is safe to play it at once. Choose the move that forces the decision in the most uncomplicated way.

Play moves that feel right. Even though it might not be the best move, your practical chances are better playing within your own realm of confidence.

Greatest success will come when one is true to oneself. If there is a choice between playing something which you like and something which you dislike but feel that your opponent will dislike even more, stick with your likes! Your practical results will improve when you play what you know, like and have confidence in. (Edmar Mednis, *How to be a Complete Tournament Player*)

## **LOGIC**

**Have a reason for every move you make and be able to explain it to yourself... verbally.** If you cannot explain why you should make the move, then do not make it. **Each move should be part of the solution to the most urgent problem of the position.**

Moves that have already been played should not affect your move choices. What matters is the position now... not how you got there. Only the present position and the future matter.

When your opponent moves, look for any new or immediate threats. Try to recall a similar position. Evaluate the position. Look for moves that will prevent your opponent from making a good move. Determine where your pieces belong. Decide on the ideal future position. Try to find the best move in the position.

# INTUITION

*Often we have to rely a lot on our intuition (which is why we work to develop it) and only calculate as much as we need to take practical decisions.*

**—Jacob Aagaard, *Excelling At Chess Calculation***

## ***IMPORTANCE OF INTUITION***

Having good intuition is important at any level, but, to play strong chess, reliable intuition is crucial. Intuition helps us decide which factors in a position are the most important. It is also extremely valuable in complex situations and in time-trouble.

Intuition and logic are both necessary in chess. There are times when calculation is called for, times when intuition should rule, and times when the right mixture of the two is called for. At the highest levels of chess, there must be a balance between the two. At the lower levels, it might be advantageous for the intuitive player to go more by his intuition than logic, and for the more methodical player to place more trust in his calculations and principles.

Humans do not have an infinite capacity to calculate (even computers do not have it), so sometimes a guess, a hunch, a gut feeling is all we have to go on. **When the position is too complicated, and the position is beyond your logic and calculating abilities, intuition can help you find the best move.**

Intuitive people do not necessarily have “good” intuition, and having great calculating ability could cause a player to play with little imagination. A balance of intuition and calculating ability is desirable.

There are times when a great tactical player will sense that a combination is available (you can develop this talent with practice). A good intuitive player can save a lot of time and effort. Always enhance instinct and intuition with a little calculation. Do not rely on intuition alone for finding the move, its value

lies mostly in the reduction of the number of candidates to evaluate.

Possessing good intuition is valuable in chess also because of the fact that tournament games are played with time limits. There will be times when you must rely on your intuition because there is not enough time to calculate accurately. If you try to analyze every move in detail, you are bound to lose on time. Many times, you need to decide complicated lines intuitively. This is not only because of time, but because complicated lines are more prone to error. Hence Bent Larsen's catchphrase: "Long think, wrong think."

Intuitive decisions are often necessary during the most critical moments of the game. These are not only the times when the positions are the most complex, but also when the outcome is uncertain.

Often, intuitively, you will want to play a certain move, but you waste a lot of time trying to justify it with concrete calculation. More than likely, if the compulsion to play the move is strong enough, you are going to play the move anyway. So, do not waste a lot of time trying to justify it. You should spend some time looking for a tactical refutation to the move, because your intuition works more along positional lines than it does along tactical ones (so there could be a tactical flaw in it). If you do not find a flaw, play it.

## ***TRUSTING YOUR INTUITION***

Your brain has many more patterns stored in it than you can consciously retrieve (maybe every pattern you have ever seen). Sometimes, these patterns may be available at a subconscious level. The unconscious process of developing an intuition is based on experience. All of the tournament games and studying that you have done in your life goes toward the formation of your intuition. The more experienced the player, usually the better the intuition, and the more they rely on it. "What people call intuition is really the brain picking up on subtle signals and learning how to use them, according to research in the journal *Neuron* in August" (Rachel Mahan, "Head Lines: Wisdom



of the Gut,” *Scientific American Mind*, January 2009).

**It is well known that, when a player initially wants to play a particular move, but changes his mind, often the original move was the better move.** For this reason, it makes sense, if you change your mind about a move, that you go back (after checking alternatives) and check that original move one more time before moving. You can often trust your first impulse, but you need to double-check it before acting on it.

**Whenever you feel uncomfortable about your position, it might be your intuition telling you that something is wrong.** This is always a signal to check everything thoroughly and to go deeper into the position. **Do not ignore your intuition. It is not flawless, but it is often a strong clue.**

Your intuition affects your expectations. Any time your opponent makes a move that was unexpected; it means that your intuition did not predict the move. It might be that your intuition failed, or it might be that the move was unexpected because it is an inferior one. Either way, you should ponder the move comprehensively. If the move was forceful, look for a tactic that you might have overlooked. If the move was unusually defensive, maybe you are not aware of a threat that you have.

Keep in mind that you cannot trust your intuition blindly. Trusting your intuition unconditionally can lead to missing obscure or surprising moves or variations for both sides.

## ***DEVELOPING YOUR INTUITION***

Intuition is a manifestation of your understanding of chess and, as such, you can improve and train it. **Playing games, and studying games and positions, are among the best ways to develop intuition** because intuition is based on experience. “In my opinion, any discoveries, even “intuitive” ones, are founded on knowledge, on the basis of what has been assimilated. But knowledge requires study, study requires time” (Yefim Geller, *The Application of*

*Chess Theory*).

Many experts suggest playing through master games, without analysis or even thinking that much, as a way to develop intuition. I once attended a lecture given by GM Bill Lombardy, in which he said that **just playing rapidly through master games, without analyzing, is a great way to learn**. He said that, even without concentrating on the moves, you would absorb, subconsciously, a great deal of knowledge from the games.

When training your intuition, you should aim not to calculate everything “to the end,” but, after checking some minimum number of variations, come to a definite conclusion as soon as possible. After then checking your opinion with the “answer,” you will see whether you were searching in the right direction, and whether or not at the very start you missed some ideas important for the taking of the decision—evaluative or specifically tactical. (Mark Dvoretsky & Artur Yusupov, *Secrets of Creative Thinking*)

The study of chess principles can also improve your intuition. **“In many instances, intuition is based upon the implementation of chess principles”** (Amatzia Avni, *Practical Chess Psychology*).

## **CREATIVITY**

Creativity is an important factor in first-rate chess. Intuition is a big part of creativity. You have to know, somehow, when to be creative.

The intuition of a chess player operates most often in difficult, highly definite instants of the chess struggle. A player senses that the moment has arrived for the most determined measures, for example, when he has to venture upon a sacrifice, begin a counter-attack, and so on. Moreover, none of this is subject to exact calculation or logical evaluation. Therefore

the thinking of a chess player should possess great will-power and an emotional slant. Incidentally, these same qualities are also required for the calculation of variations, which is inseparably linked with creative fantasy. (Aleksēi Suétin, *Three Steps to Chess Mastery*)

Creativity in chess is your character trying to express itself. **There tends to be a relationship between how interesting your personality is and how interesting your games are.**

Intuition is probably the most conspicuous feature of talent. Another is creativity. All of these attributes (creativity, intuition, and talent) are inseparably linked and all help make for a better chess player.

## PSYCHOLOGICAL

*It is difficult to overestimate the significance of psychology in chess, for it is not only knowledge, but also character, attention, will and, on occasion, the player's mood which determines the outcome of a game and its artistic value.*

**—Nikolai Krogius, *Psychology in Chess***

## THOUGHT PROCESS

The thought process in chess involves understanding, common sense, logic, judgment, intuition, decisiveness, pragmatism, concentration, fortitude, objectivity, and a quick processing rate. **Logical thinking is the leading element in the tool kit.** Intuition is important, memory is important, and other qualities are important, but logic is the main component. **Logic, coupled with methodical thinking, will solve most problems better than inspiration and fantasy.**

**If you think about a move for too long (say more than 15 minutes), then your odds of making a mistake tend to go up.** After thinking about a position for what seems like enough time, if you cannot decide between two moves, and you realize that more thought will not necessarily help you decide (or it will cost you too much time); choose the move your intuition leans towards, if your intuition is also neutral about the choice, then choose at random.

When it is your turn to move, think of the specifics in the position. Look for any new threats and look to see what he left unprotected. When it is your opponent's move, think in general terms about the position.

## PATTERN RECOGNITION

The storing of (and recognition of) patterns in your memory is a major component of chess skill. The more patterns you can recognize, and know how to play, the better will be your chances of success and the stronger player you will become. Having a large number of patterns stored in your memory helps you to play better chess.

**Patterns can be mating themes, piece maneuvers, pawn structures, opening positions, tactical combinations, pawn breaks, or endgame positions.** You first need to store the patterns in your mind through exposure, and then you need to recognize them when a similar pattern appears on the board. Your ability to recognize and use these stored patterns has a big influence on your chess playing strength.

I have always thought that if I had my time again, I would try to base my chess understanding much more firmly on pattern recognition. The general idea is that from the start of the opening, you should be examining the position and comparing the current position against the positional patterns that you have studied. Part of your thinking at every move should be to understand the changes in the availability in patterns that each move brings. (Matthew Sadler, *New In Chess*, 2003/6)

## ***ATTITUDE***

**MOTIVATION:** Having drive is necessary in order to be a good player. The players that improve are those that bounce back from losses and persevere in the face of adversity. **The players that continue to fight (during the game and game after game) are the ones that eventually progress. They do not let losses get them down.**

**HARD WORK:** Hard work can make up for a sizable lack of talent. It is an essential ingredient in good chess. Hard work in chess means sitting at the board for hours, concentrating as hard as you can, non-stop, until the game

ends. Being competitive by nature also helps. Chess is such hard work that Tartakower once said, “All chess players should have a hobby!”

**DETERMINATION:** The more mentally tough a player is, the more likely he is to find resources in difficult positions. Some players, when put to the test in a difficult situation, do not have enough determination to see it through. Without enough determination, you are likely to miss crucial opportunities that might exist in the position. A determined player will continue to fight when he is a piece down or in a bad position. With that determination, they are more likely to spot the saving or winning resource. **Never give up.**

**DESIRE TO WIN:** When a game is even, sometimes the desire to win can make all the difference. You must want to avoid losing or drawing. You cannot be apathetic to defeat. **Only think of winning. Do not even think about failure, it is not an option.**

**KILLER INSTINCT:** You need to have the “killer instinct.” Chess is a competitive game and somewhat of an outlet for aggression. Fischer said he liked to crush the other player’s ego. “**Chess is ruthless: you’ve got to be prepared to kill people**” (Nigel Short, [Chesscorner.com](http://Chesscorner.com)).

**DARING:** Taking risks and being daring are part of playing good chess. Of course, you can carry this attitude too far, but there are many instances where it is necessary to take a calculated risk. **Fate tends to be a little more charitable with the brave and ambitious.**

**POSITIVITY:** Do not give up hope in a desperate situation. **Evaluating the position with a negative attitude will obscure the possibilities.**

The two general approaches in aiming for success—in business, politics, life, chess—are the positive approach and the non-negative approach. The really great achievers, of course, are those who think positively, going out and making their own successes. This is the best approach in chess too. (Edmar Mednis, *How to Play Good Opening Moves*)

**DETACHMENT:** You must have composure and self-control.

**The secret (to playing important games) is simple: you must conduct the game as though it were of precisely no importance, but at the same time instill in each move all of your internal energy, concentrate extremely hard, and attempt to foresee anything unexpected.** (Lev Polugayevsky, *Grandmaster Preparation*)

**FIGHTER:** Chess is a battle. You must be a fighter and not break down. Once you stop fighting, you will end up on the defensive. **A strong fighting spirit can work miracles on the chessboard. If you do not have a natural fighting spirit, you have to develop it. “In any situation—fight!”** (Grigory Sanakoev, *World Champion at the Third Attempt*).

**TENACITY:** Sometimes, you have to defend a tough position for a long time, or you might have to struggle against stiff resistance with a winning position. Tenacity is the only way to persevere.

**WILLPOWER:** The insistence on accomplishing your goal is a big factor in chess. The desire and willpower of the players has a big impact on the game. **With enough willpower, you can find good moves in the dullest of positions.**

**CONFIDENCE:** Have confidence in yourself. When you play, have the attitude that no one can beat you if you play the correct moves. All you have to do is to play your best. Confidence is a big factor in success. You have to believe in yourself.

**All other things being equal, confidence wins games. Allied to the will to win, it sparks the mental ignition, brings forth ideas, dispels doubts, and promotes clear thinking. In contrast, Milquetoast timidity, befuddles, inhibits and defeats itself. By all means, use the psychological weapon. Move with alacrity, capture with impunity**

**and play with dignity!** (I.A. Horowitz & Geoffrey Mott-Smith, *Point Count Chess*)

Confidence promotes clear thinking and dispels uncertainty. Being unsure of yourself or having second thoughts about your calculations can have a devastating effect on your game. It can also lead you to play slow, safe, openings and to take the safe option whenever there is a choice. This can lead to passivity, which, in turn, usually leads to disaster.

Be confident in your ability to read the position. Do not be afraid of demons in the position and do not give too much respect to your opponent. A defeatist attitude leads to disaster.

As a rule, you should trust in your judgment and analysis and always play the move you think is best if you can see no refutation. It is better to be confident in your powers than be afraid of ghosts. (Neil McDonald, *The Art of Planning in Chess*)

Your appearance can convey a message of confidence to your opponent, too. If you do not exude an air of confidence yourself, your opponent is likely to gain confidence from your apparent lack of it.

Start with a firm handshake. **Some people can take small talk as a sign of weakness or the lack of a killer instinct. If your opponent is a famous player or someone locally well known, ask him to spell his name; act as though you have never heard of him. This might get under his skin or get him to underestimate you.**

Winning brings confidence, which in turn breeds more confidence. **Another way to gain confidence is by reminding yourself of some of your better moments, or by going over some of your best games.**

Your opponent can usually sense your confidence level. Because of that, **it can even pay to fake confidence.**



Have confidence in the principles of chess too. Be a little skeptical of each new idea and scrutinize it. **When you are convinced that the principle is valid, use it with confidence.**

Be careful not to be overconfident, though. Remember, your opponent has possibilities of his own. An overconfident player often misses what the opponent is plotting.

**COURAGE:** When you play stronger opponents, do not lose courage. That is what the stronger player wants. Remember, they are at least a little worried about losing to a weaker player. Play the board, not the player.

You must have the courage of your convictions. If you think your move is good, make it. Experience is the best teacher. Most people during a game have an idea that a certain move is good, but they are afraid to make it. That is wrong; you must go on and play what you think is good without hesitation. (José Capablanca, *My Chess Career*)

Do not overestimate your opponent's strength. Tartakower called that the greatest sin in chess. Do not fear anyone. There is always a chance of winning, even against the greatest of players. Nobody is perfect. All players make mistakes.

If you start to think about failure, you will change your play. Fear is an enemy worse than any opponent is.

**PATIENCE:** Be patient. **Impatience is one of the biggest reasons for drawing a won game or losing an otherwise even game.**

**CHARACTER:** Chess, in many ways, is a battle of character. You need character to defend a difficult position for hours. It takes a certain kind of character to have the "killer instinct." The basis of many cognitive strengths and defects come from the player's character.

The style of a player is often based on his character. Chess, in turn, can make or break what character you have.

**“Chess is like a psychological battle. To defeat your rival, you have to conquer yourself first”** (Xu Yuhua, *New In Chess*, 2006/4).

**RESILIENCE:** You have to be able to suck it up after a loss (after all, you will be doing a lot of losing). If losses throw you off balance, you will lose even more. You have to learn to let it go, and to continue trying to do your best.

If you have just been hit by a surprise tactic, shrug it off and start trying to work your way out of the setback. **If you do not believe that there is a good reply, you probably will not find one.**

**If you have been hit hard somehow, or blundered, take a little break.** Do not get demoralized. **Do not resign immediately either.** Wait until you have looked at it with a clear head.

Do not think back at bad moves or missed brilliancies and keep ruminating about them. The past is the past. Just learn from it and move on.

**AWARENESS:** It is important to be aware at all times. You will have an advantage over your opponent if you notice something he has missed. The best way to do this is to be engrossed deeply in the position. “In chess an attitude of awareness is often more desirable than dogged concentration” (Tom Unger, *Strategical Themes*).

You must also be open-minded. You should always be alert for opportunities.

No player is able to see “everything.” One is limited by one’s own criteria and tendencies. There hasn’t been a player, and there never will be one, whose way of thinking would enable him to encompass all the relevant ideas possible in any position. That, as a matter of fact, is the thing which makes the game such a fascinating mental engagement, being, as is, an encounter between two very different types of consciousness, each with its own distinctive particularities. As far as alertness is concerned, this means that there will always be certain ideas

that will slip past one's attention, and be left for the creativity of the opponent to take advantage of. (Elie Agur, *Bobby Fischer, His Approach to Chess*)

**AMBITION:** You have to play with great ambition. Ambition enables you to fight harder. You have to want to win before you can play to win.

**ENJOYMENT:** It is important to enjoy the game. Without enjoyment, it would be difficult to sustain enough motivation to play well.

## ***VISUALIZATION***

When it comes to visualization of the board and pieces, the stronger the player the less he thinks in terms of what a piece looks like (for example, the shape of a bishop vs. the shape of a rook) and the more he sees a piece based on its powers. The board is conceived of in the same way. The stronger the player the more the moves are memorized and reconstructed based on the inner meaning of the moves.

**If you can visualize the desired position, you are more likely to be able to find the moves that would be necessary in order to make it happen.** This idea is useful whether you are looking for a positional setup, a checkmate or an impregnable defensive position.

**After your opponent has moved, you should take some time to consider the move before playing your move, even if his move was expected.** This is because your mental image is never going to be as clear as the real position. A player cannot even comprehend all of the possibilities in a given position on the board, let alone in a visualized position.

Some, Donald Byrne for one, suggest that you can get a different perspective by getting up during the game and thinking about the position. Sometimes, with this approach, you can detect features that you would not necessarily see by actually looking at the position.

**Sometimes, you can see moves more clearly in blindfold chess than you do over the board.** Because, when you play blindfold chess, when you move a piece in your mind it “moves” to the new square (as if moved by a ghost)... and it no longer exists where it was. When you are actually “looking” at a position, the piece stays where it is. This, in turn, makes it a little harder to visualize the contemplated location (as well as the empty square that will exist after you move it). In other words, the resulting position is harder to visualize over-theboard than it is blindfolded. With this concept in mind, and since **1/3 of brain is devoted to processing vision**, you might occasionally try closing your eyes while analyzing chess positions. The idea is that a third of your brain is freed up which may then be useful for analysis.

## ***IMAGINATION***

To be imaginative, you should try to solve problems unconventionally (not according to the usual model). Be inventive, resourceful, and creative. You should even look for ridiculous moves. After all, your opponent has most likely overlooked the ridiculous moves.

Clearly, the ability to think in a non-standard manner needs to be developed in young players from the time of their very first steps in chess. This means the coach must not merely impart knowledge and teach them the principles and methods of combat, but also demonstrate exceptions to the rules, and, most importantly, stimulate their own investigations. (Paata Gaprindashvili, *Imagination in Chess*)

## ***OBJECTIVITY***

**You must possess objectivity. If you over-estimate or under-estimate how well you are doing in a position, your subsequent play will be**

**inaccurate.** Often, a game is lost by over-estimating an advantage, or by trying to convert too small of an advantage into a forced win. “The average player isn’t especially objective about chess” (Mihail Martin, *Chess Reports* #61, Bob Long).

You must be critical of not only yourself, but of your opponent too. One good way to get an objective perspective from your opponent’s point of view is actually to view the position from his position. In other words, think as if you were the opponent, or even get up and look at the board from his side. What would you do in this position? This is often a good way to find ideas and helps to keep your objectivity.

When you are looking for the best move in a position, be objective. Do not choose a move based on your tastes. **“He who loses his objectivity will also lose the game”** (Andrei Volokitin & Vladimir Grabinsky, *Perfect Your Chess*).

## **CONCENTRATION**

The amount of concentration that you put into a game is almost as important as your knowledge and understanding of the game. **Between equals, more concentration is decisive.** The capacity for concentration is fundamental for everything else in chess. To be able to concentrate deeply, especially during the decisive moments of a game, is one of the most important traits a player can have. “In his heyday world champion Alexander Alekhine extolled the value of concentration: **‘One feature above all determines the strength of a chess player, the undivided attention which must absolutely isolate the player from the outside world.’**” (Larry Evans, *The 10 Most Common Chess Mistakes*).

**COMPLETE:** Chess requires total concentration. You cannot let anything distract you. Try to keep your mind completely focused on the game. One thoughtless move can destroy a game.

**Often, concentration levels are lowest during the opening when**

**moves are being dashed off by rote. Games are often lost at this stage for this reason.**

Deep concentration does not necessarily mean long concentration. Often, after a long think, a player will make a bad move. Thinking too deeply or for a long time (usually considering too many complex variations) will not only cost time on the clock, but can result in poor performance.

Rather than let your concentration levels drop off during a long game, take breaks. Full concentration for four to six hours is tedious. Get up and stretch, rest the brain, and get a coffee. When you return to the board, be sure to take a few minutes to get your concentration level back up before making a move.

**SPECIFICS:** Concentrate on the game. Do not think about anything else (such as the result of the game, the standings, or other considerations not related to winning the game). Do not be vague in your thoughts. Concentrate on just a few of the most important factors in the position.

**PRESENT:** Do not think about what you could have done, or mull over an error. It is useless, demoralizing and time-consuming. Concentrate on the present position, not on what has gone before. **Repress any pointless regrets about what you should have done.**

**TO IMPROVE:** It is good practice to simulate tournament conditions by analyzing complicated positions without moving the pieces. Physical fitness also improves the ability to concentrate.

**A good way to improve your ability to concentrate is by practicing with distractions. For example, practice playing in extreme temperatures, with a lot of noise, or with many visual distractions. Another way to improve your ability to concentrate is to play some blindfold chess.**

Certain tricks might also help, such as clasping your hands around the face to narrow your field of vision, or using earplugs.

## ***DIFFERENCE BETWEEN AMATEUR AND MASTER***

### **MASTER:**

A master is thoroughly conversant with the technique of handling each phase of the game: opening, middlegame, and endgame. He treats the game as a whole, each move being part of a certain strategical or tactical concept. He keenly appreciates the possibilities of all positions. He can analyze accurately and foresees rather exactly the consequences of this move or that. He understands the basic principles involved in the various positions. His tactical play is accurate; he makes fewer and less serious mistakes than other players. He knows a great many chess games of the past and is well informed on the lines played in the tournament games of the present. (Max Euwe & Walter Meiden, *Chess Master vs. Chess Master*)

**QUICK SIGHT:** Psychological studies have indicated that stronger players see more than weaker players do, especially what is more important and relevant. Stronger players do not analyze more moves than weaker players do; they just analyze better ones.

**Having a quick sight of the board is matter of experience more so than talent.** With experience, the master goes right to the important factors in the position. He will sense the critical moments in a game and he has a better understanding of positional concepts. His advantage over the amateur is in the first few seconds of seeing a position. A weaker player spends proportionately more time looking at many irrelevant moves. The difference is even noticeable (and measurable) in the comparison of master and expert. The master sees more of what is important than the expert does, and this is based on knowledge and experience.

Capablanca, regarded to this day as the greatest “natural” chess player, boasted that he never studied the game... His famously quick

apprehension was a product of all his training, not a substitute for it. **The preponderance of psychological evidence is that experts are made, not born.** (Philip E. Ross, “The Expert Mind—Psychology and Brain Science,” *Scientific American*, August 2006)

**CALCULATION:** At the lower levels, calculation is more necessary. **The higher a player is in strength, generally the more he relies on the use of concepts.** The master does not calculate more than the amateur does, he sees more and he has a better idea of what is important. He thinks more effectively than the amateur does. The master is more likely to see the best move than the weaker player is, and he is more likely to see it much sooner ... often even instantly.

**Grandmasters, compared with club players, do not generally consider a greater number of moves or variations.** Their analysis is better in quality rather than quantity. Weak players spend more time considering weak moves, while strong players spend more time considering strong moves. The implication of this is that strong players differ from weak players primarily in perception, not processing power—a result that could almost be deduced, without experiments, from the quality of a top player’s blitz or instantaneous chess. (Jonathan Levitt, *Genius in Chess*)

**POSITIONAL:** Stronger players are more able to sense the critical moments in a game and they have a better understanding of positional considerations. They have a larger storehouse of chess positions and their related strategies. They have more knowledge of chess principles than weaker players do. They know which features of a position are more important at any given time. Masters play better chess than amateurs do because they understand the basic themes. **There is nothing supernatural about masters;**



**they just have loads of memorized and rehearsed objectives based on an array of strategical concepts and model positions.**

**200 RATING POINTS:** Larry Kaufman (*Chess Life*, March 1999) calculated that a pawn (without compensation) is roughly equivalent to 200 rating points. So, if you are rated about 200 points higher than your opponent is, you can usually afford to lose a pawn in the middlegame and still be about equal. Of course, there are many other variables to consider as well.

**PATTERN RECOGNITION:** Masters generally have more advanced pattern-recognition proficiency than amateurs have.

Recently, researchers used a new magnetic imaging technique to compare the brains of chess masters with the brains of amateurs. Their results were stunning. It demonstrated that amateurs grope and struggle to solve new chess problems, while Grandmasters rely on “expert memory,” recalling similar patterns from previously played games. Instead of spending time and energy with new problems, masters fall back on their memories to cut directly to the heart of the puzzle to find a solution. According to Grandmaster Jonathan Speelman, “It’s like learning a language. It isn’t something you do consciously. You have a large number of patterns so you can see viable moves quickly, although you don’t know they are good moves until you check.” **According to researchers, chess Grandmasters know approximately 100,000 patterns!** (Rashid Ziatdinov, *Ziatdinov Training Tips, Part 1, 300 by Hand*, [jeremysilman.com](http://jeremysilman.com))

**Odd moves:** Stronger players will usually avoid making a move that does not “look” right. The top players avoid playing odd-looking moves almost to the point of being paranoid about them.

**CONSISTENCY:** Masters are more consistent than amateurs are. Oversights, blunders, miscalculations, and other errors are less likely from a master. Lack of consistency is why a lower-rated player, who can sometimes

beat or draw a much higher-rated player, does not reach the rating level that they are occasionally capable of playing. The same inconsistency even prevents the lower-rated player from consistently beating players rated lower than him.

**SPATIAL ORIENTATION:** It has been a long-held general conception that strong chess players have a strong sense of spatial orientation. Yet, some studies have cast doubt on this assertion. For example, after testing players (of varying degrees of strength) for shape-memory, Fernand Gobet of Brunel University in London found no correlation at all between strength and visual-spatial ability among chess players.

**TIME:** Masters use their time more effectively than weaker players do. They are able to do this because of preparation, discipline and experience.

**PREPARATION:** Masters are usually well prepared when they enter a tournament. Their openings have usually been chosen carefully and have been studied thoroughly.

**MISTAKES:** Masters play better than amateurs do for many reasons. Obviously, they make fewer mistakes. If they did not, they would not become a master. They make fewer mistakes because they have learned to be careful. Their experience also helps keep them from going down the wrong paths. They also tend to make different kinds of mistakes than amateurs. That is why the manner in which masters beat each other is often more subtle and less apparent than the way they beat amateurs.

Masters also can turn the tables and induce mistakes from their amateur opponents. “Grandmasters play sometimes like this in Swiss tournaments against amateurs. They keep the tension during the time-trouble, complicate the game and finally manage to provoke a decisive mistake” (Sergei Shipov, *Super Tournaments 2003*, Sergei Soloviov).

**ENDGAME:** Masters play all phases of the game well. **The endgame is generally considered to be the area that most separates the master from the amateur.** It even separates the master from the expert. **A master has a**

**complete understanding of basic endgame play.**

**MEMORY:** Studies have shown that grandmasters do not necessarily score any better than weaker players do when it comes to memory tests. The commonly held belief, that all masters possess phenomenal abilities to memorize and recall information, is apparently incorrect.

## **PSYCHOLOGICAL BARRIERS**

**MOVES:** Some moves are psychologically harder to spot than others are. **It can be hard to discover a move that moves a piece backwards to the square it came from, or any retreating or backwards move (we tend to consider only forward moves).** “Sometimes, in the heat of the struggle, you forget about backward moves and only consider going forward!” (Ruslan Ponomariov, *New In Chess*, 2006/1). Long moves are often difficult to spot, because our concentration is on a smaller part of the board. **Long diagonal moves that are also backwards are often overlooked.**

**Odd moves** are often overlooked. If it does not fit one of the typical patterns, a move can easily go undetected. For example, if two bishops are opposite each other on a diagonal, the normal move is either to exchange or to move off the diagonal. To move closer or farther away on the same diagonal is psychologically harder to see because it is unusual. “The knight is the only chessman which does not move along line-of-sight paths. We therefore find it considerably more difficult to visualize the knight’s potential for movement” (Charles Alexander, *Knight Moves*).

A move that you rejected in earlier analysis, but that later becomes a good move, might be hard to find. Some combinations can be easily missed. Frequently, a player who does not almost immediately see a combination misses it altogether.

**SETBACKS:** If you have just made a serious mistake, or let a win or draw slip away, it can be hard to adjust psychologically. **When this happens, relax**

**and look at the position from a totally new and fresh perspective.** If you do not, you are likely to let your position deteriorate even further. **If you are suddenly faced with a startling surprise, do not reply immediately.** Take time to assess the move. **Try to understand why it is a shock to you.** Do not get pessimistic. A psychologically crushed player will usually lose.

**TRUST: Do not trust your opponent's calculations.** If you are playing a player who has a reputation of being a good calculator, do not assume that his sacrifices and combinations will be sound. Verify them suspiciously. Check them out. Often, even Tal's sacrifices and attacks were unsound.

## ***PSYCHOLOGICAL PLAY***

**OPPONENT:** Make a mental assessment of your opponent. Try to sense his confidence level, his state of alertness, his mood. If your opponent is edgy, irritated or impatient, you can often catch them in a tactical trap. **Attack a shy player ferociously. Force an overly aggressive player to give up the initiative.** If you know your opponent's strengths, avoid those strengths. **Take him into territory that is unfamiliar to him and, at the same time, comfortable for you.**

During the game, be alert to your opponent's breathing. When most players see something dramatic for himself or his opponent, their breathing becomes heavier. Consider the opponent's character, willpower, emotions, and mood. Be careful though. Sometimes, the player might be trying to bluff you. **Objectivity should come first, but when given a choice of moves, choose the one that goes against your opponent's psychological bent.**

Try not to pay too much attention to your opponent's body language; he could be acting. If he looks dejected, as though he is lost, it could be an act. In fact, it would be a good time to look for a trap that he might have set for you. If you are ahead, play the board. If you are worse, you might

consider mind games.

**The opponent's tournament situation is a factor with psychological implications.** If he must win, he is likely to play too cautiously and avoid risks. You can adapt your style accordingly.

**UNCLEAR: If the position is unclear, there is usually little sense in spending too much time evaluating it.** This is when psychological factors and style become important. Playing for complications (or playing to create an unclear position) is an extreme measure that you should only use when you cannot find a clear and reasonable plan. Then again, if you choose to muddy the waters, play into your style and, at the same time, play what is uncomfortable for your opponent. "Unbalancing the position after three-and-a-half hours of maneuvering against an older opponent is generally a good idea" (Alex Yermolinsky, *The Road to Chess Improvement*).

Gambits usually give the gambiteer a psychological advantage. The opponent is forced into a situation not necessarily to their liking. When the position is unclear, unbalanced, or sharp it can be a psychological advantage for the player who is in control.

The opposite can be true as well. In even positions, you can cause your opponent some anxiety by making quiet moves. In this case, do not force the issue. Let his uncertainty lead to mistakes.

**PASSIVE DEFENSE:** In tense positions, passive defense does not usually work well. Passive defense allows the attacker too many choices because he does not face any real threats. It is also psychologically difficult to play passive defense, and will usually lead to errors. "The best way to unsettle the opponent is to give him something to worry about" (Yasser Seirawan, *Winning Chess Brilliances*).

Unexpected moves can cause some psychological pressure for your opponent. A surprise counterattack can psychologically unbalance a player who thought he had everything under control. "There is only one way to meet

a real surprise (by real I mean not only unexpected, but quite sound), and that is by not doing the logical, expected move, but offering (if possible) a counter-surprise!” (Anthony Santasiere & Ken Smith, *The Romantic King’s Gambit*).

## **MEMORY**

Understanding and intuition are much more important in chess than memorization, but a player’s capacity for memory can be a valuable factor in his chess development. Of course, you cannot learn at all without using your memory to some extent. Intuition is based on experience, and experience cannot be valuable if it is not retained.

We try to remember ideas, patterns, methods, techniques, and openings. The best way to do that is for them to make sense in some sort of context, to focus on them while trying to learn, and then to rehearse them. The reasons behind what you are trying to memorize are an important part of the process. Understanding the reasons helps you to retrieve the information.

Creativity and imagination are considered by many to be more important than memory in chess. However, creativity and imagination are both rooted in a subconscious kind of memory. It would probably be impossible to be creative or imaginative in chess if you could not remember what was normal to begin with.

Getting a good night’s sleep is important for enhancing your memory. This is when what you have learned is converted into long-term memory.

## **RISKS**

Too much caution in chess can be dangerous. **If you do not take risks every now and then, you are not going to win as often as you would if you did.** No one knows how much risk to take, but it is generally accepted that it is necessary on occasion. **If you have a clearly decisive risk-free way to win,**

**though, take it. To choose a flashier option (that entails more risk) would be a mistake.**

There are primarily two kinds of risk in chess, the calculated risk with a high degree of certainty, and the intuitive risk. The intuitive risk is usually made in order to sharpen the position by a player who thinks he is the one most likely to be able to take advantage of the ensuing opportunities.

A seemingly simple positional assessment, such as “white is better,” often requires wading through a complex tactical maze, which is difficult to navigate even in analysis, let alone over the board with the clock ticking. The top players know this and frequently take even substantial risks to unbalance the position and create winning chances. By doing this they sometimes break positional and strategic “rules” once thought to be universally valid. The ability to distinguish occasions when exceptions from “rules” can lead to success is the mark of a great master. (Igor Stohl, *Instructive Modern Chess Masterpieces*)

Safety can be dangerous in chess. **The idea of playing safe can cause you to play too defensively.** This can give more options and the initiative to your opponent. The danger in the position tends to escalate. **You have to learn to trust your intuition.**

Sometimes, if you take a risk, your opponent will want to punish your audacity. He might then easily make errors in trying to penalize your move.

# 3



## *Endgame*

*It has been said that most tournament players play the openings like Grandmasters, the middlegame like experts, and the endings like children.*

**—Alex Dunne, *How to Become a Candidate Master***

### ABOUT THE ENDGAME

IN DISCUSSING ENDGAMES, the terms “white” and “black” customarily denote the superior and inferior sides (or the strong and weak sides), respectively (a convention used by Reuben Fine in *Basic Chess Endings*).

**WHEN IS ENDGAME:** There is no universally agreed upon definition of when a game is in the endgame. Some general guidelines, though, are:

- When king safety is not of the utmost concern.
- Exchanges of some material have taken place.
- The queens are off (although, not necessarily).
- Typical middlegame characteristics are gone.
- Thoughts turn to pawn promotion.
- When neither side has the equivalent of a queen and a minor piece.

**WHEN TO HEAD FOR ENDGAME:** The master is always prepared and aware, at any stage of the game, of the prospects of heading for the endgame.



**Generally, you should steer for an endgame if you have a material advantage, a superior pawn structure, or as a defense to an attack.**

**TAKE BREAK:** As soon as the queens are traded, or whatever the signal is that you have entered the endgame, it is a good idea to clear your mind and start thinking in terms of the endgame. This can mean getting up and walking away from the board (except in blitz, or time-trouble of course). Set new priorities, reevaluate the position and get into your endgame form.

**DIFFERENT PRINCIPLES:** Good endgame play differs from opening and middlegame play. It has its own set of guidelines. The endgame is more different from the opening and the middlegame than they are from each other. Some of the principles that apply to the opening and middlegame are reversed in the endgame. For example, in the middlegame, you should put your pawns on squares of the same color as your opponent's bishop (to limit its activity). In contrast, in the endgame, you should put them on the opposite color (to defend them from being captured). Another change of attitude is the use of the king. In the opening and middle-game, the king is safeguarded. In the endgame, it becomes a useful fighting piece.

**In the endgame, concerns like development and opening lines for attack are not as central as pushing passed pawns, controlling critical squares, blockading, and king penetration.** The pawn center diminishes in importance. Other differences are, for example, in the middlegame your goal might be the gain of material or mate. In the endgame, mate is rare and exchanges are significant and often decisive. Exchanges in the endgame are often avoided by the stronger side (preferring restriction instead). For example, a cut off piece in the middlegame might not be a serious problem (one piece out of maybe three or four), but in the endgame with a few remaining pieces, it can easily be decisive.

In the middlegame, there are often many threats. In the endgame, there are usually fewer threats. Because of that, you have to be more alert for the real

threats.

**Endgame theory does not change much from generation to generation.** These days, computers are solving various endings, but overall the theory has remained quite stable over time.

Always bear in mind your general principles however complicated the situation may seem. Yes, if anything, the more complex the position seems, the more important all those “rooks behind passed pawns” and “activate your king” type of principles become. (Chris Ward, *Starting Out: Rook Endgames*)

**ORDER OF ACTIVATION:** In the endgame, it is important to have active pieces. Since there are fewer of them, it is more important to maximize their individual powers. Except for the king, **activate the pieces in the opposite order that they are developed in the opening.** Another way to look at it is, except for the king, to activate them in descending order of power (strongest pieces first): Queen, rook, king, bishop and knight. Remember, the king follows the rook.

**APPROACH:** In the endgame, there is much less room for imagination and a great deal more emphasis is placed on technique. This kind of ability comes from experience and serious study. **The endgame is less of an art and more of a science.** It is time for mostly learned procedures and brute calculation. It is not all about technique and memory, but involves calculation and logic as well. **It is also a time to be patient.** “If your opponent is paralyzed, position your pieces to their best squares before attempting anything decisive” (Bill Robertie, *Basic Endgame Strategy*).

**PLANNING:** To win a game in the endgame, you must plan. Do not think move to move, but make a plan. You have to build up an advantage and convert it to a win. **In the middlegame, changing plans is frequently a good idea. In the endgame, it is just about always good to stick to your plan.**

Planning is so important in the endgame because the kings and pawns move so slowly (and pawns do not move backwards) and their positions are crucial. The more knowledge of basic endings that you have, the better you can plan. **“Normally, the problem in a complex ending is to transpose into the sort of positions that have already been studied”** (Yuri Averbakh, *Chess Endings, Essential Knowledge*).

Planning is an important aspect in all stages of a chess game, and this is particularly the case in the endgame, having a plan of action is important, but executing it smoothly is usually hindered by the violent tactical outbursts that are liable to occur at a moment's notice. In the endgame, such outbursts are unusual, and so finding the correct plan can assume paramount importance. Capablanca was particularly skilled at this. When analyzing an endgame position, he would simply pick up the pieces and put them on the squares where they needed to be. He would leave the technical details of how they could legally arrive there until later. (Bryon Jacobs, *Modern Practical Endings, Bishop vs. Knight*)

**ENDGAME MISCELLANEOUS:** “Always look out for simple tactics. It is a human trait (‘failing’) that in endgames the mind tends to look out for tactics a lot less than in complicated middlegames” (Edmar Mednis, *Better Endgame Play*).

**Your pieces need to be active.** Immobile pieces are a big problem in the endgame. In a bad position, activate your pieces, even at the cost of material. Sacrificing a pawn for activity is usually a good idea (especially if it reduces the mobility of one of the opponent's pieces). As important as pawns are in the endgame, passivity is worse. **Keep your strongest piece active.**

In the endgame, if your pawns and pieces are cut off or spread out, bring them together into a team effort. The pawns and pieces should work together in a single, coordinated, gradual advance. The occupation of critical squares in the endgame is often instantly decisive. One of the main ideas in the endgame

is to provoke weaknesses.

In the endgame, the player with the advantage usually should exchange pieces (while you are at it, try to exchange off his best pieces or defending pieces); the defender usually should exchange pawns. A general endgame rule is **to win, trade pieces, but to draw, trade pawns**. The idea is to prevent your opponent from promoting. The advantage of a piece or two (without pawns) may not be enough to win. If you have the exchange of pawns for a piece, attempt to trade pieces and pawns. Do not simplify for the sake of simplicity. If you have an inferior position, simplifying can make matters worse.

Material is important in the endgame. A material advantage often wins endgames. Be stingy about your material in the endgame (even if you are ahead in material).

As in the rest of the game, the best defense in the endgame is often a counterattack. If there are not any good counterattacking possibilities and you cannot break out of a bind with brute force, then it might be possible to crouch behind a fortress and try to hold.

The most drawish endgames are (in order from most drawing):

1. bishops of opposite color
2. two rooks
3. four rooks
4. knight vs. bishop
5. bishops
6. queens
7. knights
8. king-and-pawn

**It is important to take the utmost care in the initial stages of the endgame. Setting off on the wrong course can be costly.** The smallest error can be immediately decisive. A thorough analysis in the endgame is more

important than at the earlier stages of the game, when, sometimes, you can still rectify errors. In the endgame, most actions are irreversible.

The endgame is what usually separates the strong players from the rest. Playing the endgame well is a sign of a good player. Inexperienced players are often at their weakest and make the most mistakes in the endgame.

While not a matter of technique, calculation is also important in the endgame. When there are fewer pieces, each move is more critical. With many pieces on the board, the second best move may suffice, but with only a few pieces left, the consequences of each move are more crucial. Being able to project a few more moves deeper into the position can be advantageous, but strong technique, in many cases, can be almost a full replacement for the need to calculate.

One of the secrets of winning endgame play is accurate calculation. The player who can see a move or two farther than his opponent has a big advantage when the number of pieces is small and a lot hinges on every move. (Bill Robertie, *Basic Endgame Strategy*)

**In the endgame, you should not hurry.** This does not mean that tempo is not important; it is. It means that the general pace of play is slower. In fact, there can even be times in the endgame when losing time is beneficial. If you have an advantage, there is not as much of a rush to exploit it as there is in the middlegame when dynamics (such as the initiative) rule. It is still beneficial to be accurate and time saving, but **you can generally take your time to strengthen your position and to prevent counterplay.**

If your opponent has no counterplay at all, or cannot improve his position, take all the time you need to put your pieces on their best squares. Strengthen your position to the maximum before starting the committal and decisive maneuvers. Work from a position of strength.

Sometimes, underpromoting is white's best strategy in order to counter a

possible stalemate defense. For example, in a situation where promoting to a queen will produce a stalemate, underpromotion might give you a decisive material advantage while avoiding the stalemate (underpromoting to a knight can even checkmate on the move in some cases). Along these same lines, you should only underpromote to a rook or bishop in order to avoid a stalemate.

Often, the psychological toll on the defender will cause him to weaken his position while you strengthen yours. If you have the advantage, but cannot find a forced win, one idea is to maneuver around harmlessly and let your opponent overextend himself while trying too hard to draw.

## TECHNIQUE

Technique in chess is essentially the methods behind winning a won game or drawing a drawn game. It is the way to take a learned method and use it to achieve a specific goal. There are techniques for basic mating patterns and the promoting of pawns that involve almost every conceivable combination of pieces and pawns. Most of the basic positions have been worked out in detail. The fundamental difference between technique and other chess skills is that, instead of being about accumulating advantages, it is about exploiting them. Technique is not restricted to the endgame. It can be a big factor in the late middlegame as well.

It is not so much of an intellectual ability as it is a learned method, a series of moves. In a technical position, the outcome is a matter of applying the correct procedure. It is something that the player has learned from study or experience.

Grandmasters know the proper technique for hundreds, even thousands, of types of positions. The objective for them, then, is to transpose an existing position into a favorable one of these known endgames. There are techniques for king and pawn endings, rook endings, bishop vs. knight, mating with various combinations of pieces, and many more. For the average player,

knowing 30–40 positions from memory (mostly rook and pawn endings) and a basic understanding of the endgame principles can provide reasonably good endgame technique. “Logical positions differ from technical ones in that the means of resolving the conflict is provided not by a series of moves, but by strategy, i.e. a series of logical transformations, taking account of the opponent’s possible actions” (B.S. Vainstein, *David Bronstein, Chess Improviser*).

Knowing technique saves a lot of time and energy over-the-board. It also insures a degree of accuracy and instills confidence. It also gives you a way to forecast the results of entering into a certain plan. With technical expertise, you know when a position is technically good or bad, or if something is technically likely or not, without performing a lot of error-prone calculation. Of course, be sure not to simplify down into a lost position.

**METHOD:** The objective, in a complex endgame, is to transpose to a position that you have the correct technical knowledge for. It is important to anticipate the arrival of the endgame so you can react properly. Careful, unhurried play and knowledge based on experience and study are the key factors. Technique is not about imagination, brilliance, or the ability to calculate. It is a learned method.

## WINNING A WON GAME

It is often said that the most difficult task in chess is to win a won game. Once you have a winning position, you have to convert it into a win. You are likely to lose a won endgame, though, if you do not know the principles or technique for that particular endgame.

**One of the first steps is to pick a continuation that prevents your opponent from getting counterplay while you safely realize the win. For example, if you have a choice between a line that leads to a decisive positional advantage with balanced material and one that yields the same advantage, but the material is imbalanced, you should choose the first**

**line.** The reason is counterplay. With imbalanced material, your opponent may have some chances.

If you have the advantage, you have to be precise or you can lose it. **Avoid lines that require a lot of calculation** (they are subject to error). Do not gamble. **Avoid unnecessary complications.** “When you have a great advantage, you should never let events on the board get out of your control, that is, enter complications where any result is possible” (Mark Dvoretsky, *Dvoretsky’s Analytical Manual*).

When you have a won game, there is a tendency to relax and back off from the attack. Try to avoid this tendency. Keeping the pressure on the opponent is the best way to get your opponent to make a mistake. **Keep looking for a knockout blow; just do not go out on a limb to deliver it.**

A false sense of security can destroy your alertness. **When you have a won game, be extra cautious.** The phrase “and the rest was a matter of technique” implies that the game will play itself from this point. Of course, that is not the case; you need to be as attentive as always. Furthermore, when you get down to the last pawn or two, be extra careful. Without the possibility of promoting a pawn, your opponent often can easily draw the game. Piece centralization is still useful in the endgame. If your pieces are centralized, they can swing much more easily to one sector or the other than if they are not centralized.

**TECHNIQUE:** All winning positions do not necessarily contain forced variations that win material or are technical wins. Sometimes, you have to transpose them into a position with a winning technique.

Obtaining a won game is something many people can do, but converting that won game into a win is one of the abilities that separate the strong players from the herd. To get a won game, you often have to take risks. To win a won game, a completely different attitude is necessary. It is a matter of technique. Aim for the basic position of a known theoretical win.



**SIMPLICITY:** “Simplicity” and “simplify” are two different, but related, requirements when you are trying to win a won game. “When winning is possible it is best to win in the simplest possible way” (James Mason, *Principles of Chess*). Do not play for brilliancies or tricks when a safe, easy, uncomplicated, or forced win is possible. Do not let the game get out of your control by entering into complications.

**“The more you are winning, the more you should think defense first; the more you are losing, the more you should think offense”** (Dan Heisman, *Everyone’s 2<sup>nd</sup> Chessbook*). Think defense first, but do not play defensively. Do not take any unnecessary risks. Being safe does not mean to be afraid. Being timid can also be a mistake. If possible, take away your opponent’s counterplay. **In general, when you are winning, you should also avoid races to promote pawns unless you are completely confident that you will win the race. If you have a choice between a material gain and an unclear mating prospect, take the material.** With the extra material, you can mate later.

**SIMPLIFY:** One of the basic steps in the process of winning a won game is to simplify. The most important exchange is the exchange of queens. Not only is the exchange queens a signal that you are in an endgame, but it changes the character of the game substantially. After the exchange of queens, you should take a break, if you can, and readjust your thinking. Now, instead of trying to accumulate advantages, try to convert the ones you have into a win.

In general, if you are trying to win a won game you should try to exchange pieces but not necessarily pawns. An exchange minimizes your opponent’s chances for counterplay and increases your relative advantage. Try to exchange your opponent’s more active, or better-placed, pieces for your less active ones, if possible. Another good idea is to try to exchange one of his defending pieces. At least trade equal pieces, but do not give up a better piece for one of his worse ones; it could turn the tide against you.

**PSYCHOLOGICAL:** You cannot ease up in a technical position. The game

will not win itself. You still have to be alert for tactical shots and drawing chances. When we think we have a won game, we often relax, and that can lead to mistakes. Remember to double-check the situation and not to hurry. Do not get overconfident, and keep a lookout for the decisive blow. These slow, methodical, monotonous moves, repetition of the position, and minute improvements can create a psychological strain on your opponent and often he will start making mistakes or get desperate and make an unsound attempt to equalize.

Be bold and aggressive even when trying to win a won game. Keep your thinking clear and rational. Any small error, temporary carelessness, weakness, or underestimation of your opponent can turn the game around on the spot.

**WINNING DRAWN GAME:** Your best chance to win a drawn game is, in many ways, the opposite of winning a won game. If you feel you have to win a game that is apparently drawn, the best idea is to create an imbalance of some kind. Complicate the game and give your opponent chances to go wrong.

## TRANSITION

The transition from middlegame to endgame is often made possible by a weakness in your opponent's pawn structure, the opportunity to get a rook to the seventh or eighth rank, space being converted to the initiative (which leads to an attack or gain of material), or some other positional opportunity. The transition is a time when players are usually vulnerable to mistakes. **More mistakes occur in the transition (or right after it) than in either the middle-game or the endgame.** This is probably because of the change of mentality that is necessary when going from the middlegame to the endgame. So, prepare yourself for the transition. Before you head for the endgame, make an actual plan for winning or drawing the game.

The better you know the type of endgame you are getting into, the better the transition should go. The idea is to simplify into a superior endgame.

Sometimes, a player does not want to give up his advantages in order to transition into a decisive endgame. However, that is how games are won.

The player with the material advantage should try to transition into the most easily winning endgame. His opponent should try to prevent an endgame altogether or, failing that, try to transpose into one that is difficult or impossible to win.

**If you have a material advantage, you should usually take advantage of it by transitioning into the endgame.** One of the solutions to the transition is having the knowledge of when to trade pieces and knowing what pieces to trade. Sometimes, exchanges can nullify an advantage (for example, being a piece up and simplifying down to lone king vs. bishop). **Automatic simplification is not always the correct approach. If you have a positional advantage, simplification is usually not the correct method.** It is probably better to convert it to a material advantage first.

When you are about to transition into the endgame, consider the pawn structure more than the individual moves. Consider the optimum piece placement for that particular pawn structure. Then, when you reach the endgame, thoroughly reevaluate the position from a fresh perspective.

If you are ahead on pawns, you should exchange queens. Your opponent will have more trouble defending weaknesses and he will have fewer prospects for counterplay. Knights and same-colored bishops do not usually present much of an obstacle when it comes to promoting pawns. Queens, rooks, and opposite-colored bishops are a different story. You should usually exchange them first before trying to promote.

If you have the advantage, try to exchange your opponent's most active pieces. That will increase your advantage. **If you have an inferior piece, you can sometimes get some compensation for its inactivity by the greater activity of the other pieces.** If you have a material advantage, first try to strengthen your own position, disable any of your opponent's immediate

threats, and eliminate or restrict your opponent's counterplay. Try to position your pieces on safe active squares (centralized if possible). Then, simplify by exchanging pieces and transitioning into the endgame. Once in the endgame, the simplifying usually continues. Sometimes, the simplification process might require some sacrifices. **The exchange sacrifice is a frequent resource in the transition.**

## KING

**FIGHTING PIECE:** The king increases in value in the endgame more than any of the other pieces do. It grows from the weakest piece to one of the strongest ones. It becomes a fighting piece. Without the threat of mate, it is not necessary for it to hide. It can become active.

The excellent mobility of the king makes it a major factor in the endgame. The king is strong in the endgame; use it aggressively. It is unsurpassed in its ability to navigate among the pawns.

**VALUE:** The king can move in eight different directions. The king is the most important factor in pawn endings. Some have placed the value of a king in the endgame at three points (or, in general, equal to a minor piece). Others say that the fighting power of a king (especially a centralized one) is approximately equal to a rook.

The value of the king increases as the number of remaining pieces on the board decreases. The king's power also increases, generally, with every move it makes toward the opponent's first rank. When the kings are opposed in the center, the more advanced of the two is the most likely to have the advantage.

**CASTLING:** If you have not already castled, do not do it automatically in the endgame. Usually, it is better not to castle in the endgame so your king can get to the center faster. As long as it is safe, you will usually save a few moves by not castling.

**ACTIVITY:** It is advantageous to have the more active king. For example, if you have your king on the fourth rank and your opponent's is on the third, this should be better for you. **Having the more active king is usually the strongest advantage (other than material) that a player can have in the endgame.**

Often enough the choice between having an active or passive king comes down to psychological factors. Even though there seems to be nothing wrong with an active king move, "wouldn't it be better to play it safe?" As a general principle, the answer is "No!"—the king can be very powerful in the endgame, therefore, activate and use it! (Edmar Mednis, *King in the Endgame*)

Getting the opposition is such an important factor in the endgame that activating your king first is essential. In order to get active, the king needs mobility. You can help the king's mobility by keeping the king free of obstruction from its own pawns and pieces, opening lines, and having a favorable pawn structure.

**It is interesting (and possibly useful) to note that the king has no single shortest route for its movement.** Unless it is traveling along a diagonal, each course takes the same number of moves. As an example, a king going from e1 to e4 has seven different ways to get there in three moves.

**POSITION:** Most endgames depend on the king's nearness to the center, nearness to the opponent's pawns, nearness to his own pawns and its position relative to the opponent's king. **The general rule is that the king belongs in the center.** This way it has the best chance to be part of the action. Centralization will confer more freedom and, at the same time, will restrict the mobility of your opponent's king. **Centralize the king as rapidly as possible.**

When exchanges are being contemplated, you should consider the possibilities for improving your king position first. You want to be the one

whose king is left with the better position. This can make all of the difference in the endgame.

## PAWNS

In pawn endings, there are no such evaluations as “white is better” or “the position is equal.” In pawn endings, the position is either a technical win or a technical draw. In addition, **of all the endgames, pawn endings are the easiest to win.**

**VALUES:** If a pawn is not under attack, it generally increases in value as it advances beyond the fourth rank. **Pawns increase in value in the endgame,** even more than rooks do. They become more important because most endgames are decided by the promotion of a pawn and, in the endgame, there is less material left to prevent that promotion.

**Pawns increase in value as they advance past the third rank.** In a normal position, two pawns are not sufficient compensation for a minor piece. In the middlegame, a piece and three pawns are about equal. However, as pieces are removed from the board, the value shifts in favor of the pawns. For example, with a king and a minor piece vs. king and three pawns, the side with the piece has no real winning chances; whereas, the side with the pawns has no losing chances and all the winning chances. **A pawn on the sixth rank is worth two pawns and can be as valuable as a piece (or more). Two connected pawns on the sixth rank are usually equal to or better than a rook. A pawn on the seventh rank can be worth many pawns.** Weak pawns (for example, doubled or isolated pawns) are a different story. Usually, even a large number of weak pawns are not as good as a bishop.

**Wing pawns become more valuable relative to central pawns as material diminishes.** When there is only about 14 units of material (for each side) left on the board, they start to become even more valuable than center

pawns. The center pawns lose their importance because their cramping effect is no longer needed and outposts are not as useful. Where a rimpawn is not as valuable as another pawn, though, is in the drawing chances. A rimpawn leads to a draw more often than an innerpawn because it has no lee side (it controls only one square instead of two).

**CONVERSION:** In the endgame, you must convert any advantages that you have into a win. Often, that means converting the advantage of one pawn into a win. If you have a positional superiority, you need to convert it into a material gain. That is usually accomplished by attacking pawns with your king.

**EXCHANGING:** If you are a pawn up, it is usually a good idea to exchange pieces, because it is easier to win without pieces on the board than with them. If you are up a piece, do not let all your pawns disappear. Because, without pawns, your opponent can more easily draw the game. If you are losing, though, exchange pawns. If you are winning, try to keep as many pawns as you can. Some pawn exchanges, when you are a piece up in the middlegame, can give your pieces more scope; but in the endgame you should try to keep at least one pawn for winning chances.

**When you're losing, try to exchange pawns; when you're winning, try to keep as many pawns as possible on the board. If the defender can exchange all the pawns, he can usually draw.** The more pawns he can exchange, the closer he gets to that goal. For the side who's winning, of course, the opposite holds true. (Bill Robertie, *Basic Endgame Strategy*)

**MAJORITIES:** If you are a pawn down, try to leave pawns on one side only. Draws are much more likely with pawns on one wing than on both. If you have a pawn advantage, do not leave all of the pawns on one wing. If you and your opponent both have majorities on opposite sides of the board, advance your pawns on your minority side in such a way as to stop him from activating his majority in a healthy way. Generally, when there are four pawns

vs. three, and they are all on the same wing, the fate of the game depends on what pieces are left on the board.

**The more pawns on the board, the better are the winning chances (the fewer pawns, the better the drawing chances).** For example, king + 1 pawn vs. king draws about 50% of the time. With one extra pawn each (K + 2 vs. K + 1) the winning chance goes up to about 90%, and with one more pawn each (K + 3 vs. K + 2) the winning chances go up to about 95%.

**Bishop: In the endgame, it is usually advisable to put your pawns on the color opposite of your own bishop.** If the pawn structure is fairly fixed, exchange your bishop that is on the same color squares as your pawns.

In the middlegame, it is usually best to have your pawns on the same color as your opponent's bishop (to limit its scope). In the endgame, it is usually best to have your pawns on the opposite color of your opponent's bishop (to protect them).

**VARIOUS METHODS:** If you are one or two pawns ahead, the win is usually simple: push the pawns; that will usually lead to a material gain. You can then use that material to capture more material, and, eventually, you can deliver mate.

**If there are several pieces on the board in the endgame and your opponent has sacrificed a piece in order to get a passed pawn, stop the pawn (or pawns) first before trying to exploit your new material advantage.**

If a bishop is used in place of a pawn next to the tip of a pawn chain, it does not change the winning technique. It is still best to set the middle or bottom parts of the chain in motion.

**Passive defense can work against rook and knight pawns, but it does not work against inner pawns.** Rook pawns present greater drawing chances than other pawns. Therefore, if you are trying to win, you might try to exchange them (to reduce the drawing chances). It is usually best to block a



rook pawn with your own pawn as far forward as possible.

**A basic method of winning endgames is to generate multiple promotion threats, especially on opposite wings.** This can stretch your opponent too thin and lead to a successful promotion.

## ***PASSED PAWNS***

**King position and the possession of passed pawns are the two most important aspects of king and pawn endgames.** In the endgame, it is usually a good idea to try to create a passed pawn as soon as possible. The passed pawn gives your king the freedom to be of use elsewhere (in other words, it is not tied to the defense of the pawn). You must use the passed pawn in order for it to be valuable. Do not let it sit there. In order to win an endgame, even when ahead in material, you usually need to have a passed pawn. Often, the passed pawn clinches the victory.

**METHOD: Before creating or pushing a passed pawn, get all of your pieces to their optimum squares. “Candidate first”** is the rule for creating the passed pawn. If you have a majority facing a minority, the general rule is to push the unopposed pawn first (the potential passed pawn). Advance your king ahead of the pawn.

A passed pawn may not be decisive on its own. It might be blockaded or exchanged. Often, an additional objective is necessary as a distraction. Then, your opponent may not be able to defend the two simultaneous threats. **“The general rule is to push the passed pawn that is farthest away from the defender”** (Andrew Soltis, *Turning Advantage into Victory in Chess*).

If you are the defender against a passed pawn, you should usually try to **blockade it as far from the queening square as possible.** Try to get in front of the passed pawn with your king.

If you have a passed pawn, usually you should try to keep the major pieces on the board. Unless it is an outside passed pawn, in which case you should try

to keep the minor pieces on the board.

**CONNECTED PASSED PAWNS:** Two connected passed pawns on the sixth rank are usually a decisive factor. Connected passed pawns are nearly always stronger than pawns that are not connected, especially in rook and pawn endgames. To defend against two connected passed pawns, try to get a rook behind the furthest advanced pawn.

**OUTSIDE PASSED PAWNS:** The main idea of the outside passed pawn is to use it as a decoy to divert the opponent's king to the other side of the board, while you attack the pawns that he has left defenseless. The greater the distance from your outside passed pawn to the opponent's pawns on the other wing, the better. This can force the opponent's king to travel too far from his own pawns. If you have a choice of which passed pawn to push first; push the one that is farthest from the enemy king.

The same idea applies to pawn majorities. The majority farthest from the opponent's king is the most valuable. That majority is most likely to produce a passed pawn farthest from the opponent's king.

Rook pawns can be valuable when there are many pawns on the board, but when there is only one pawn on the board, or all of the pawns are on one side, they can be weak. When the strong side has a rook pawn it can give drawing chances to the weaker side because their king can sometimes get in front of the pawn and you cannot force the king away. Stalemating possibilities can even be created this way.

In most endgames, the presence of rook-pawns (a-pawns or h-pawns) gives the defending side drawing chances that normally would not exist. The reason for this resides in the diminished activity of any king that steps in front of such a pawn (since that king can now only move towards the center of the board—going the other way would make the poor monarch fall off the edge of the world). This diminished activity allows many stalemate possibilities that simply don't occur with other pawns.

(Jeremy Silman, *Silman's Complete Endgame Course*)

Since, in pawn endings, outside passed pawns are stronger than inside pawns, you should normally capture toward the edge of the board (**away from the center**). The player with the outside passed pawn (or the prospect of one) is usually wise to exchange the major pieces and keep the minor ones on the board because such a setup is usually beneficial in converting the advantage. This is different advice from the central passed pawn (where keeping the major pieces is preferable).

## **WEAK PAWNS**

Weak pawns are a serious handicap in the endgame, even for the stronger side. It can nullify a material advantage. A solid pawn structure can be instrumental in an endgame. “Weak pawns are a burden to their defender, and condemn his pieces to passivity” (Fred Reinfeld, *The Complete Chessplayer*).

## **PAWN RACES**

When counting moves in a pawn race, for simplicity, do not count captures and recaptures. Count carefully and be sure to consider whose turn it is to move at the end of the count. In the case of two connected passed pawns vs. a single pawn in a pawn race, as long as his opponent cannot develop a counterattack, the stronger side usually wins if he gets his king in front of his pawns.

The technique of counting in a pawn race has some drawbacks. One is that it cannot always detect all of the finesses that are available in the position. In a pawn race, always be alert to tactical tricks. Tactics can completely change conditions on the spot.

## **ISOLATED PAWNS**

An isolated pawn in the endgame can be a weakness. Its strength in the middle-game comes from the dynamic play it affords. That dynamic play is not likely to be possible in the endgame because of the reduced material. As a result, the isolated pawn becomes a static weakness. Then again, usually, isolated pawns are only a weakness in endgames when the opponent has a rook. They are scarcely a factor at all in minor piece endgames.

## ***DOUBLED PAWNS***

Doubled pawns are a disadvantage in every kind of endgame. They are especially weak when two pawns are blocked by one.

If the doubled pawns are separated by a square or more, white has a tempo at his disposal, but black has the benefit of not being blocked from a side attack to the front pawn.

## **OPPOSITION**

**Probably the single most important concept in K and P endgames is the idea of the opposition.** The opposition is a special type of corresponding squares (corresponding squares are squares on which both sides are in zugzwang). **The player with one square between his king and his opponent's king has the opposition if it is his opponent's turn to move** (or he has the opposition if it is his turn to move and there are two squares between the kings). The opposition can be diagonal, rank or file (horizontal or vertical), direct, indirect, or distant.

**The logic behind the opposition is that the king without it must give ground to the king that has it. That, in turn, allows the king with the opposition to penetrate into the position.** If you have the opposition, your opponent cannot force the advance of his king and he cannot prevent yours from advancing. With the opposition, often the king can work his way to the

seventh rank and shield the pawn all the way to promotion. Usually, the player with the pawn and the opposition will win, whereas without the opposition he will draw.

If, by getting the opposition, you cannot get your king in front of your pawn, it is of no use to seize the opposition. The opposition is useful when attacking (to get your king into your opponent's territory).

You can use the opposition to "outflank" your opponent. "Outflanking," in this sense, is when the opponent's king is forced to go to one side, and then you go to the other. The opposition can be a useful device when defending (to prevent your opponent's king from penetrating or outflanking).

**To gain the distant or indirect opposition (in fact, any kind of opposition), move your king to the same color square that the opponent's king is on, being sure to form a square or rectangle (in relation to the kings) with an odd number of squares on each side. Another way to visualize the opposition is with your kings on the same color squares with an odd number of squares between them by the most direct route.** This applies whether the kings are on the same file or not. If the kings are on the same file, gaining the opposition is a simple matter of keeping an odd number of squares between the kings.

Having the opposition is not always an endgame advantage. Sometimes, because of the presence of pawns or pieces, having the opposition can even be a disadvantage. When obstacles can possibly affect the path taken by the kings, it is best to calculate.

## **RULE OF THE SQUARE**

**The rule of the Square is one of the most important calculating tools in the endgame.** Imagine a square, one side of which is a line from the pawn to its promotion square. The other side is drawn towards the defending king. Another way to envision the square is to draw a diagonal line from the pawn to

the promotion rank (in the direction of the defending king), then complete the square.

**If the defending king is in the square of the pawn or can enter it on the move** (and is able to stay in it as the pawn advances), **then it can catch the pawn before or immediately after it promotes**; if not, it cannot catch it. If the rule is applied to a pawn that is on its original square, we have to remember to consider the fact that the pawn can move two squares on its first move. In that case, the square is drawn from the third rank instead of the second (or sixth instead of seventh).

## TRIANGULATION

Usually, it is best to have the move, but, sometimes, it is better not to be on the move. When that happens, triangulation is a possible solution. By triangulating with your king, you can sometimes get the opposition.

Triangulation is not possible with lone kings. The presence of pawns makes the move possible (by restricting the movement of the defender).

**Triangulation involves moving the king three times and returning to the original square. This is achieved by moving the king on a triangular route.** The object is to arrive at the same position as the starting position, with it being your opponent's move. It is a way to lose the move. The purpose of losing the move is usually to attain the opposition, which, in turn, is to infiltrate with the king.

The triangulation is a temporizing move that is only important in zugzwang positions and when the king that is triangulating has more maneuvering space than the opponent's king does. The intention of triangulating is to force the opponent's king into zugzwang. If you have the opposition, and moving will lose it, triangulation sometimes can be the remedy.

# ZUGZWANG

“Zugzwang is a tactical element that is typical for the endgame. On it, for example, is based almost the entire theory of pawn endings, including the theory of the opposition and of critical squares” (Luděk Pachman, *Attack and Defense in Modern Chess Tactics*). Zugzwang occurs almost exclusively in the endgame.

As the number of pieces on the board increases, the probability for zugzwang to occur decreases. As a consequence, zugzwang in the middlegame is a rarity. Occasionally, there appears in the press a middlegame position that some commentators hasten to label a “zugzwang” position, while in reality it is just a lost position due to extremely passive placement of the loser’s pieces. (Alex Angos, *You Move... i Win!*)

**Zugzwang is the mutual disadvantage to move** (and there can be no waiting moves available). In zugzwang, either player would have a decisive disadvantage (losing a won or drawn game, or drawing a won game) if it was their turn to move. “If a position is Zugzwang, the turn to move always decides the outcome of the game” (Robert Brieger & R.W. Twombly, *In Search of Zugzwang*).

Contrary to customary usage, zugzwang positions are reciprocal. Customarily, the word zugzwang is used when a player (who is in zugzwang) has no good moves. Although, correctly speaking, if the disadvantage of moving is not the same for both sides, it is not zugzwang. In other words, there must not be any moves available to either player that will not have a decisive disadvantage to the player that must move. “In a true zugzwang, there are no waiting moves available to either player” (Robert Brieger, *The Art of Triangulation*). This also means that, in the strict sense, you cannot set up

zugzwang by triangulation because triangulation is reversible.

**“Squeeze” is the correct term for what most of us usually mean when we use the term “zugzwang.”** When the next move will weaken a position regardless of the move chosen, it is a “squeeze.” Squeezes, like zugzwangs, for all practical purposes, only occur in the endgame. With zugzwang, the side to move (whoever moves) is forced to play a move that will lose the game for him (or draw an otherwise won game). A squeeze is not necessarily decisive, the superior side may have waiting moves, and it is not a mutual condition.

In the customary sense of the word (where only one side has the problem, i.e., a squeeze) zugzwang plays a big role in the endgame. Almost all pawn endings involve zugzwang. Zugzwang is an element in the techniques of opposition, triangulation, and corresponding squares.

Some of the features of a position that may lead to zugzwang (for your opponent) are that his pieces cannot move (safely or at all), any move by your opponent will worsen his position, or his pieces are overloaded. Zugzwang occurs mostly in pure pawn endgames, but it is possible in most other situations (to a much lesser extent). Knights, being the only piece that cannot lose a tempo, are also individually subject to a kind of zugzwang.

## MARKING TIME

With mantras such as “there is no need to hurry” and “repetition rules endgames,” it is no wonder that occasionally there is a benefit to marking time. In the endgame, as in the middlegame, the king can be an effective time-killer. However, since it is usually easier to form a concrete plan in the endgame, the need to mark time is less frequent.

Not only does repeating a move gain some time on the clock, but it can play mind games with your opponent as well. The opponent will often be looking for a way to break the repetition and, as a result, will often go astray. Using your king to mark time, so your opponent is caught in a zugzwang, is a



typical endgame strategy.

## KING AND PAWN ENDINGS

King and pawn endgames form the foundation of all endgame play. Most other endgames can simplify down to king and pawn endgames. When a game has become a king and pawn endgame, it has been reduced to bare mathematics. Every player should be familiar with these endings. The top players rarely play king and pawn endings because most of these endings are so well known to both players (as being decisive or drawn) that they resign or agree to a draw without actually playing them out.

The most important role in pawn endings is played by the king. **Pure king and pawn endings are the easiest endings in chess.** This is because there are no pieces to complicate matters and the goals are clear and generally uncomplicated.

In spite of their simplicity, king & pawn endgames are among the most difficult of all endgames. **There is no room for mistakes in a king and pawn endgame.** Each mistake is worth at least the half point because there can only be one correct plan. That is why **it is essential for a good player to have a solid understanding of these endgames.**

**It can be useful, in king and pawn endings, to have at least one pawn on its original square. That way, if you need to gain or lose a tempo, you can choose between a moves of one or two squares.**

**WIN/DRAW:** If pawns are equal, the game is drawn unless one side has a distinct positional advantage (usually the better king position). Being one pawn up, unless white has a serious positional weakness, is usually enough of an advantage to win a king and pawn ending. This is because you can use the extra pawn to create a passed pawn. If there are pawns on the opposite wing, you can use the newly created passed pawn as a decoy to lure the black king

away from the defense of its pawns to stop it, while the strong king goes after the pawns that black had to leave defenseless.

In a king and pawn ending, **having the king on the sixth rank ahead of a safe pawn on the same file (except the a- or h-file) is a sure win.**

Endings with all of the pawns on one wing are usually drawn (even if one player has an extra pawn). That is why, when a pawn down, you should try to exchange off all of the pawns on the wing where you are equal and try to draw on the minority wing.

**RULES: The superior side wants symmetry, to make the advantage stands out. The inferior side wants imbalance, so there are chances for each side.**

**The king belongs in front of your pawns.** Do not try to march the pawns down the board without help; **develop your king first.** Often, the kings will fight for control of the promotion square.

**In the endgame, centralize your king.** Both kings will usually move to the center first and then go to one wing (if and when necessary).

#### **KING AND PAWN VS. KING ENDINGS:**

King and Inside Pawn vs. king: **If the pawn has crossed the middle line, all the strong side has to do to win is stay in front of the pawn. If the pawn has not crossed the middle line, advance the king first and then the pawn.** So, move as far forward with your king as you can (being sure not to endanger your pawn in the process). Advance the pawn only as necessary. With the king far advanced, you can take the opposition whenever you want it because you can always make tempo moves with the pawn.

**If the strong side has his king directly in front of the pawn, but the king is not yet on the sixth rank (in other words, it is on the 3<sup>rd</sup> – 5<sup>th</sup> ranks) he wins only if he has the opposition.** If the weak side has the opposition, then the game is a draw. If the pawn is a square further back behind

the king (allowing a tempo move to get the opposition), it is a win for white. **The strong side always wins if his king is on the sixth rank or two or more squares ahead of his pawn.** So, whenever you have a choice, move your king before moving your pawn.

**Doubled pawns will always win (unless they cannot be defended or they are RPs)** because there is always an extra tempo available in order to gain the opposition. You should only move the rear pawn when necessary. Do not advance both pawns up the file together because that will increase black's chances for an accidental stalemate. The best time to move the rear pawn is after the front pawn reaches the seventh rank and the move is needed in order to win the opposition.

Defense: **The defending king should try to advance his king as far forward as possible, to try to prevent the strong side from getting his king in front of the pawn.** With king and pawn vs. king, black's best defense (other than winning the pawn) is to blockade it. Then again, blockading the pawn does not always draw, unless the pawn is a rook-pawn.

King and RP vs. king: **A king and rook-pawn is a draw if the black king can reach the promotion square (even if white has a bishop of the opposite color of the promotion square).** If the black king gets in front of the pawn, the game is a draw. **A win is impossible if black's king gets the corner promotion square or barricades the white king in that corner.**

**If white's king is behind his pawn and black can get his king in front of the pawn, then black can draw by always moving straight backwards (not to one side) whenever being forced to give ground.**

If the black king can reach his B1 square (nearest the RP) before the pawn reaches the seventh rank, black draws. If white's king can reach Kt7, white wins.

**KING AND PAWN VS. KING AND PAWN ENDINGS:** When both sides have a king and a pawn, if black can sacrifice his pawn but get the opposition, the

game is drawn unless white's pawn is on the 5<sup>th</sup> rank and white's king is in front of the pawn.

**KING AND 2 PAWNS VS. KING AND PAWN ENDINGS:** About 80% of the time the strong side wins. There are some exceptions (mostly rook-pawns and sometimes knight-pawns), but white wins (usually with bishop-pawns and center-pawns) unless the pawn position is blocked, or almost blocked, and he does not have the opposition.

**KING AND 2 PAWNS VS. KING AND 2 PAWNS ENDINGS:** Usually, this ending is drawn, but it entirely depends on the positional factors.

**KING AND 3 PAWNS VS. KING ENDINGS:** If the king goes against three connected passed pawns, it should blockade the farthest advanced ones. If the pawns are abreast on the same rank, put the king in the center of the pawns with two ranks in between. That way, he can blockade whichever pawn advances first.

**KING AND 3 PAWNS VS. KING AND 2 PAWNS ENDINGS:** Ninety percent of these endings are won by the stronger side. With most pawn positions, and all normal pawn positions, it is easier to win with three pawns vs. two than with two pawns vs. one. If you have three pawns and your opponent has two, it is better for you to have three vs. two on the same wing than to have all of your pawns on one wing and all of his on the other.

**KING AND 5 PAWNS VS. KING AND 4 PAWNS (WITH QUEENSIDE MAJORITY) ENDINGS:** The strategy to win this type of ending is to:

1. Centralize the king.
2. Push the queenside pawns in order to create a passed pawn.
3. Use the passed pawn as a decoy to attract the defender's king.
4. Then, capture enough undefended kingside pawns with your king to guarantee the win.

## **MINOR PIECE ENDINGS**

In minor piece endgames, the key factor is activity (of the pieces and pawns). The more active side has the best winning chances. The role of the king is also substantial. Pawns on the side files, and pawn majorities, take on more significance in minor piece endgames than in rook endgames.

The general principle is that as the amount of material on the board decreases, the power of the pawns increases. In the ultimate simple case—bishop or knight vs. three pawns—it is obvious that only the pawns' side has winning chances. (Edmar Mednis, *Questions and Answers on Practical Endgame Play*)

Another key ingredient in multiple piece endgames (which includes minor piece endgames) is the coordination between the pieces. The coordination between pieces in the endgame is best when the pieces complement each other the most. The bishop pair, for example, is possibly the best case of pieces mutually complementing each other.

One of the factors that determine the coordination of pieces is the duplication of function. Generally, the less the duplication of function that there is between the pieces, the better the coordination is. The bishops in the bishop pair do not duplicate functions, because they are on different colors. Any other pair (of identical pieces) does duplicate function. This is also the reason queens generally work better with knights than bishops (the queen duplicates the bishop function, not the knight's). Rooks usually work better with bishops than with knights, but not because of any duplication of function; there is no duplication with either combination. Of course, as always, the pawn structure and the position can make for exceptions.

**MINOR PIECE AND PAWN VS. MINOR PIECE AND 2 PAWNS ENDINGS:** Generally, white only wins if he has a passed pawn. The bishop is stronger when the pawns are separated. The black knight can be better when white's bishop is a bad bishop.

**MINOR PIECE VS. 3 PAWNS ENDINGS:** Because three connected passed pawns is a potent force, the side with the piece has a better chance if the pawns are separated on both sides of the board. If the minor piece is a knight, it is equal if the pawns are on the fourth rank, but lost for the knight if they are far advanced or widely separated. The bishop usually draws against three pawns unless they are well advanced.

## ***BISHOP ENDINGS***

A bishop can lose a move. In other words, it can move a different number of squares along its diagonal, so it can return to the original square in any number of moves. This can be a useful tool in creating or avoiding zugzwang positions.

The bishop does best in endings where the pawns are on both wings. The farther they are apart the better.

It may be a handicap for the bishop, to some extent, if the opponent's pawns are on the bishop's color (however, it is not usually a major shortcoming), but having its own pawns on its color is usually bad. If you have a bad bishop, try to keep another piece on the board so you can control squares of the opposite color of your bad bishop.

Generally, it is a good idea to keep your king off the squares of the color of your opponent's bishop. By doing so, you reduce the opportunity for tactics and tempo gains for your opponent.

**BISHOP AND PAWN VS. KING ENDINGS:** If the pawn is not a rook-pawn, and it is safe, the side with the pawn always wins. If the pawn is a rook-pawn, it is safe and it queens on a square the same color as the bishop, it wins. If the rook-pawn queens on the opposite color of the bishop, it is a draw. If the promotion square is of the opposite color of the bishop, the bishop cannot check the king in the corner. In which case, the game ends in either a draw or a stalemate.

**BISHOPS OF WRONG COLOR ENDINGS:** Endgames of a lone king vs. a rook-pawn of the wrong color (the bishop is the opposite color of the promotion square) are drawn if the defending king can reach the promotion square. King and minor piece vs. bishop and two pawns (one of which is a rook-pawn of the opposite color of the strong side's bishop) can still draw if the defending king can sacrifice his piece for the good pawn and occupy the promotion square with his king. The strong side cannot force the king out of the corner. Any attempt draws or stalemates.

**TWO BISHOP ENDINGS:** Two bishops are usually better than two knights or B + N, but not always. Usually, the bishop pair is better in the endgame because endgames tend to be more open, and bishops perform better in open positions. In addition, if the bishops are on adjoining diagonals, they exert a synergistic power. It is possible for the bishop pair to be inferior to two other minor pieces. For example, they can be inferior if the bishops are passive or hindered by the pawn structure, or if the opponent has a space advantage or active pieces.

**If your opponent has the bishop pair, try to exchange one of them.** This, at least, will break down their synergy. If you possess the bishop pair, do not let one of them be exchanged unless you are transforming the advantage into a better one.

Even though two bishops are a little stronger than a rook, the mate with two bishops is a little more difficult than with a rook because the bishops need to be coordinated with each other and the king. To mate with two bishops you have to drive the opponent's king to the edge of the board (by cutting off diagonals) and then into any corner. You can usually do it in less than 18 moves.

White should remember that bishops are long-range pieces and not to get them too close to the black king (which might subject them to capture). Without pawns, and against a lone king, it is necessary for white to include his

king in the hunt. Black should try to stay in the center as long as possible and should try to avoid the corners. If there are other pieces or pawns on the board, a sacrifice is often necessary to get the open diagonals necessary for the bishops to achieve the mate.

**BISHOP VS. PAWNS ENDINGS:** The bishop does well against pawns because of its long-range ability. You must keep it active, though, for it to be effective.

The bishop draws against a single pawn and usually against two pawns (with the help of the king). The bishop can lose against a single pawn if it is unable to get to the right diagonal or if that diagonal is too short.

In the case of B vs. two isolated pawns, the king and bishop each hold one of the pawns. If the king is too far away, the bishop must do it all. With B vs. two connected pawns, and the kings are not involved, the bishop can generally defend if the pawns are not beyond the fifth rank.

Against three pawns, the bishop can only hold if the pawns cannot safely cross the fourth rank (get to the fifth rank or beyond). If the side with the bishop has a pawn with promotion possibilities, it increases his chances significantly. **Bishop vs. three isolated pawns should win for the pawns if one pawn has reached the sixth rank and it is safe.**

**In the endgame, you should put your pawns on the opposite color of the opponent's bishop, so it cannot attack them (in the middlegame, the reverse is true; the pawns generally belong on the same color).** Although, in the case of bishop vs. connected passed pawns, the side with the bishop wants to get the pawns on the opposite color so he can blockade them with the bishop. This is done along a diagonal controlling the square in front of each pawn.

**BISHOP VS. BISHOP AND PAWN ENDINGS:** If the defending king can get to any square in front of the pawn without being chased away, it is a draw; otherwise, it is a loss. **If the defending king cannot get in front of the pawn,**



**then he should try to attack the pawn from the rear.**

In a B + 2 connected passed pawns vs. B endgame, if both pawns can reach the sixth rank safely, they can win. Only rarely (usually by way of a king blockade or wrong colored bishop and rook-pawn) will white have a problem winning this ending.

**Pawns gain in strength as the power of the pieces left on the board decreases.** Accordingly, the pawn is worth more when there are weaker pieces on the board than when there are stronger pieces on the board. For example, an extra pawn in a queen ending is of relatively less importance than when there are only minor pieces on the board. The extra pawn in a B vs. B + pawn ending is of significant value and confers winning chances, especially with bishops of the same color.

**If you have the pawns in a bishop vs. bishop (of the same color) and two connected pawns ending, if they are abreast push the pawn of the color of the bishop first.**

There are three basic kinds of drawn endings with bishop vs. bishop and pawn: 1) The black king is on a square in front of the white pawn that is opposite of the color of white's bishop. 2) Black's king can prevent his bishop from being driven away and white cannot block its diagonal. 3) The driving away of black's bishop or the blocking of the bishop's lines leads to a drawn endgame.

**BISHOP AND PAWNS VS. BISHOP AND PAWNS ENDINGS:** If the bishops are on the same color, the outside passed pawn is almost as valuable as in endings with knights. Bishop vs. bishop with three vs. three pawns on one wing and an extra outside passed pawn on the other wing should be a win.

In three vs. two or four vs. three endings (with same color bishops) if the pawns are all on the same wing it is usually a draw. The biggest factor is whether the pawns are on the same color of the bishops. It is a disadvantage to have pawns on the color of your bishop, and an advantage for your opponent,

since you will have a bad bishop and he will have the good bishop.

**BISHOP VS. KNIGHT ENDINGS: The bishop is usually stronger in open positions, especially if there is play on both wings or a wing majority exists.** The bishop can threaten both wings at the same time. The knight can usually defend only one threat at a time and, since the king probably should not leave the center, the bishop usually prevails. **The bishop is stronger when there are passed pawns present or when there are few pawns on the board.** The bishop's superiority over knights in the endgame is more pronounced when the pawns are unbalanced. That is, they are not all on the same files.

**Bishops are better than knights in all types of endgame positions except when the pawn structure is blocked or all of the play is on one side of the board.** Bishops can immobilize knights single-handedly. Bishops are better in zugzwang positions. The bishop can lose a move, if necessary. The knight is a potential zugzwang victim, because it cannot move while continuing to guard the same square.

Bishops are better than knights in pawn-race positions. Bishops are better than knights when there are pawns on both wings, especially if there are rooks still in the game.

If you have the bishop, try to keep pawns on both flanks, aim for an asymmetrical pawn structure, and keep the position open and unblocked. Try to create a passed pawn to tie your opponent's king and knight down. If all or most of the pawns are on the same color as the bishop, its mobility is curtailed (and the opposite color squares become weak) and the knight is better.

Knights do well when the pawn structure is blocked and they have secure outposts. When all of the pawns are on one wing, or distributed over four files or less, the knight tends to be better. The bishop will usually be better than the knight in positions with pawns on one side if the bishop has an extra pawn (even if it is the wrong rook-pawn).

When you have the knight against a bishop, keep the game closed and do not create a passed pawn unless you are sure it will be decisive. If you have the knight, you should keep it close to your army; if it goes too far astray, it can become isolated or trapped. **Exchanging unlike pieces (in other words, a bishop for a knight) improves the defender's drawing chances.** It follows, then, that the superior side should only exchange similar pieces.

If you have an active knight vs. a bad bishop, try to tempt or force the opponent's pawns on one wing into a blocked structure on the same color of the bishop. Try to create holes in the position (of the color opposite of the bishop) for the king to enter on. Avoid exchanging the opponent's bad bishop. Exchange other pieces, though (especially the good bishop, if the opponent has one). **The knight's superiority over the bad bishop is the greatest when there are no other pieces on the board.** Try to post the knight on an outpost on the color opposite of the bad bishop.

A lone bishop vs. a lone knight are equal against each other, but the bishop is a little better than the knight when up against a rook, or in the endgame against several pawns. When there is no material advantage for either side, the bishop is generally better. If there is a slight positional advantage, the bishop can usually exploit it better. When there is a material advantage, the relative value of the knight and bishop is of minor importance. The advantage of a single pawn (with other pawns still on the board) is usually enough to give a decisive advantage to the side with either the bishop or the knight.

**Bishop vs. knight endings tend to be tactical and complicated. Most other endings are more strategical. Therefore, in bishop vs. knight endings, you should always stay tactically alert.**

**BISHOP AND PAWN VS. KNIGHT ENDINGS:** A one-pawn advantage is not always enough to win. It can be accomplished, however, when the black king is far away or the knight can be driven off.

However, two pawns (or a pawn up with other pawns still on the board) is usually enough to win. If white's pawns are both passed, the bishop can usually support them, and at the same time, prevent the enemy pawn from advancing. Black can only draw if the pawns are blockaded or one of the pawns is a rook-pawn on the wrong color (in other words, the promotion square is not controlled by the bishop) and the knight can sacrifice itself for the other pawn. It is helpful for white to move his pawns to squares opposite the color of his bishop to help prevent them from becoming blockaded.

**BISHOP VS. KNIGHT AND PAWN ENDINGS:** The bishop usually draws against a knight and pawn because of the effectiveness of the bishop against pawns. For the knight to prevail, the pawn needs to be well advanced and the enemy king far enough away from the action. The bishop even has drawing chances against a knight and two pawns. If the pawns are connected, the knight usually wins, but, if one of the pawns is a rook-pawn and the bishop and king can blockade the pawns, the bishop side can draw. White can win if he can block the bishop's diagonal with his knight in order to advance the pawn, or if the bishop's diagonal is too short.

**TWO BISHOPS VS. KNIGHT ENDINGS:** Proved relatively recently by computers, two bishops vs. knight is a win for the bishops, but a difficult one (even for a grandmaster). Luckily, it hardly ever comes up.

**TWO BISHOPS VS. BISHOP AND KNIGHT ENDINGS:** Having two bishops vs. bishop and knight confers a slight advantage to the player with the two bishops.

**BISHOP AND KNIGHT VS. KING ENDINGS:** The strong side can win this endgame. This is a difficult, but possible, mate against a lone king. The technique involves driving the king to the edge of the board, and then into the corner. The strong side can deliver mate in all four corners, but can only force it in the corners of the same color as the bishop. To force the king into a corner, it is necessary for the two pieces and the king to work together (the

knight and king watching the squares that the bishop does not control). It is difficult to prevent the king from escaping to the opposite color corner.

With the combined effort of his king and pieces, white should first push black's king to the edge of the board, then to a corner of the bishop's color, and then deliver mate with the bishop. The exact process has a specific pattern, which is helpful to learn. Black should try to stay in the center of the board or near a corner opposite of the color of the attacking bishop. The mate takes about 35–40 moves to accomplish with perfect play. That is why, because of the 50-move rule, it is a good idea to know the technique.

**BISHOP AND KNIGHT VS. KNIGHT ENDINGS:** White can only rarely win this ending (without pawns). It is possible if black's king is distant and the knight's moves are limited.

**BISHOPS OF SAME COLOR ENDINGS:** When opposing bishops are on the same color, being a pawn up confers the better chances. The drawing chances for black usually depend on whether he can establish a permanent blockade with his king. An advantage of two pawns is nearly always a win.

To win, white needs to support his passed pawn with his king or advance an outside passed pawn as a decoy so he can penetrate with his king to capture the now vulnerable pawns.

To defend, black can try to create a fortress of pawns and pieces that prevents white's king from advancing. Another way is to arrange the position so that the bishop, on one diagonal, at the same time prevents the advance of white's pawns and king. Trying to defend on two diagonals is risky because white can possibly generate zugzwang threats or use a decoy method.

### **BISHOPS OF OPPOSITE COLOR ENDINGS:**

Drawn: Bishops of opposite color endings are drawish, even if one side has a material advantage. If you are inferior in the middlegame, or in order to save a difficult position, you might be able to draw by heading for an opposite-

colored bishop endgame. **Having a material advantage is less important in bishops of opposite color endings than in most other endings. One or two extra pawns are not usually enough for a win in these positions, and sometimes three pawns still draws.** The reason is that the bishops cannot attack the same squares (or each other), and a king cannot capture a pawn or the bishop if they defend each other. Besides, sometimes, the side with the bishop can sacrifice it for the remaining pawn (which would leave the opponent with insufficient mating material).

**The drawing tendencies of opposite-colored bishop endgames begin to be felt when the major pieces have been exchanged.** With an added pair of rooks, though, the story is significantly different; then, it is possible to convert even a small advantage to a win. One extra pawn is then normally enough for winning chances. With a one-pawn advantage, the stronger side does better with both players having an additional rook or knight than an additional queen. The additional queen affords too much counter chances for the defender.

Offense: Do not assume that the game is a draw. **The stronger side should advance connected passed pawns by moving first with a pawn that goes to a square of the same color of the opponent's bishop.**

The king's influence is more important in opposite-colored bishop endgames than in same-colored bishop endings since the king is the only remaining piece that can operate on the other color. Be careful not to advance your pawns so that the defender's bishop and king can blockade them. Specifically, **do not put connected passed pawns on the same color as your bishop.**

If there are other pieces still on the board, you must not play passively. You have to seek the initiative and get play. To win an opposite-colored bishop endgame, you need to use long-term planning, possess the ability to maintain tension and have good technique. **The winning concept is usually to create**

**play on both wings.** This can sometimes even win in opposite-colored bishop endings with equal pawns.

**The stronger side has the best winning chances with more pieces on the board. So, when you have opposite-colored bishops, do not routinely exchange pieces without compensation.** The opposite-colored bishops can confer good attacking prospects with more material on the board.

**When there are other pieces on the board with the opposite-colored bishops, the game is usually sharp. This is because each side can gain dominance on opposite diagonals since there are no bishops to challenge either bishop.**

**DEFENSE:** The defenses for playing material down in opposite-colored bishop endings are mainly the blockade and the fortress. If you can blockade the stronger side's pawns from a square where his bishop cannot control, you might be able to hold. The best outpost for the defending bishop is where it can prevent two threats simultaneously.

When you are behind in material in an opposite-colored bishop ending, it is usually best to build a fortress and move back and forth inside of it. **If you are playing for a draw in a bishop of opposite-colors endings, with no other pieces on the board, it is usually better to have your pawns on the same color as your bishop. This is a reversal from the basic principles, and practically the only kind of position in which the reversal applies** (it does not even apply if there are other pieces on the board). The reason for putting your pawns on the same color as your bishop is for defense. If you left them on the color of your opponent's bishop, the pawns would be subject to attack. With the pawns on the same color as your bishop, you might be able to create an impenetrable fortress. The only way the strong side can win is by a passed pawn supported by the king. That being the case, if you can prevent the king from penetrating by building a fortress in front of his king, you can draw.

**Pawns:** Often, one or two extra pawns are not enough to win a bishop of

opposite-color endgame, sometimes even three is not enough. An advantage of one pawn is not enough to win if there are no other pawns on the board. An advantage of two pawns will not win if the defender can blockade them. About 80% of games with one extra pawn are drawn and about 40% of games with two extra pawns are drawn. When it comes to winning, it is the number of active passed pawns that is important, more so than the number of extra pawns.

In bishops of opposite-color endgames, the quality of the pawns is more important than the quantity of them. Two connected pawns (in bishop of opposite color endings) are not usually enough to win (unless they are on or past the sixth rank). Two connected passed pawns past the sixth rank can win, even if black has a passed pawn of his own (as long as the black passer can be stopped by the white bishop on the same diagonal that it uses to protect its own pawns).

Connected passed pawns are better than isolated passed pawns, but **passed pawns that are widely separated (and cannot both be controlled by the bishop on one diagonal) are even better than connected passed pawns**; the farther apart, the better the winning chances. This is because the farther apart the pawns are the less able the king and bishop are to form a blockade. If the pawns are separated by one file, the game is often drawn because the defending king and bishop should be able to blockade the pawns. When the pawns are separated by two files there are still drawing chances, especially if the bishop can control the squares in front of both pawns. Generally, the endgame is won if the pawns are separated by two or more empty files. The drawing chances are nearly gone if the pawns are separated by three or more files (unless one of the pawns is a rook-pawn of the wrong color, in which case a draw is likely). All of this depends on the actual position.

Pawns are sacrificed in opposite-colored bishop endgames even more liberally than in rook endings. One reason is that the remaining pawns are not as likely to be as big of a risk as in other endgames. Another reason for the



sacrifices is to create the crucial passed pawns.

## ***KNIGHT ENDINGS***

**STRENGTHS:** The knight is not as easily obstructed as a bishop is. The knight can control squares of both colors.

**WEAKNESSES:** A knight cannot gain or lose a move like the other pieces, so it cannot achieve zugzwang positions. It can take up to six moves to reach a given square.

**SPACE:** A space advantage can be a significant factor in knight endings. With a space advantage, you have more room in which to maneuver your knight.

**DEFENSE:** To prevent the knight from approaching the king, a good place to put your king in single knight ending is two squares from the knight on a diagonal to the knight. It takes three moves for the knight to check from that position.

### **KNIGHT AND PAWN ENDINGS:**

Pawn Capturing: In knight endings, white should capture toward the edge of the board (away from the center) because outside passed pawns are stronger than any others are.

Outside Passed Pawns: “Because the knight is a short range piece, there is one major difference between knight endgames and those of other pieces: the increased importance of passed pawns” (Edmar Mednis, *Practical Knight Endings*). **Knights have trouble against passed pawns, especially outside passed pawns. Outside passed pawns, in knight endings, gives the possessor good winning chances.** Just like in pawn endings, you can stretch the defending king too thin by trying to simultaneously stop the outside passed pawn and guard his own. While the defending king is on one side of the

board trying to stop the passer, the other king can penetrate and capture the pawns that were left behind. That is why the saying that **knight endings are really pawn endings** (in pawn endings and knight endings the outside passed pawns are valuable and there is a lot of triangulation in both types of endings). Remember this phrase: “Rook pawns are a nightmare” (Lev Alburt & Al lawrence, *Chess Rules of Thumb*).

Protected Passed Pawns: **The knight is the best blockading piece. In addition, its unique move capability lets it attack the pawn that protects the pawn that the knight is blockading. For these reasons, if you are headed for an ending where you will be defending against a protected passed pawn, the knight is the best piece to have for the defense.** The protected passed pawn is still an advantage, but it is less of an advantage against a knight than any other piece.

Split Pawns: In knight endings, it is advantageous for the defender to have the pawns grouped as close together as possible on one side. The farther apart the pawns are, the more area that the defender must defend, and the smaller the chances are for him to draw.

Blocked Pawns: **Usually, when the pawns are blocked, the best square for a knight is on the same color as its pawns.** That way it controls some squares of the color opposite of its pawns, which contributes to the total number of squares controlled.

**KNIGHT AND PAWN VS. KING ENDINGS**: This ending is always a win for the strong side, except if the pawn is a rook-pawn and it is on the seventh rank. A lone king can draw against a knight plus rook-pawn if the pawn is on the seventh rank, the strong king is trapped in the corner in front of it (for example, on a8) and the defending king and the knight are on the same color. The defending king can then move back and forth from bishop-1 to bishop-2 (c8 to c7) and, because the knight cannot lose a move, the defending side draws.

## KNIGHT VS. PAWN ENDINGS:

Mobile Pawns: **A lone knight cannot force the capture of a mobile pawn.** If the knight attacks it, it moves. To capture a mobile pawn, the knight needs the assistance of the king.

Rook Pawns: **The rook-pawn is the most difficult pawn for the knight to stop because the knight's moves are limited near the edge of the board.** A rare win for the side with the knight is possible, though, if the pawn is on the seventh rank and its king is trapped in the corner in front of it (by the opposing king); the player with the knight can then deliver mate. The knight-pawn is the second most difficult pawn for the knight to stop.

Non-Rook Pawns: **A lone knight in front of a hostile pawn on the seventh rank can draw without help from its king.**

IQP: **A lone knight is better to have (than a bishop) against an isolated queen pawn.**

**Knight and Pawn vs. Knight Endings:** The defending king should try to get in front of the pawn. This ending is usually a draw because the defender can sacrifice the knight for the pawn (either by capturing the pawn or as a decoy to lure the strong side's knight away from the pawn) or it can blockade the pawn. If the pawn is supported by the king and advanced far enough (or a rook-pawn), though, it can win.

**KNIGHT AND DOUBLED PAWN VS. KNIGHT ENDINGS:** If the doubled pawns are on a rook's file, it is usually a draw. If the pawns are on the Knight's file, the strong side usually wins. This is because the defending knight cannot function on both sides of the pawns. In the case of a bishop's pawn or a center pawn, it can be a win or a draw depending on piece activity and king position.

**KNIGHT AND PAWN VS. KNIGHT AND PAWN ENDINGS:** With equal pawns, this ending is usually drawn. It is possible for one side to have a decisive advantage, though, such as a passed pawn that the opponent cannot stop, superior king or piece placement, or the possibility of trapping a piece.

Since it is a short-range piece, a knight cannot have an impact on both sides of the board at the same time. With an outside passed pawn on one wing, the opponent's knight will be tied to preventing its advancement. As a result, you would be effectively up a piece on the other side of the board.

If both players have passed pawns, the side with the most advanced passed pawn has the advantage.

**KNIGHT AND PAWNS VS. KNIGHT AND PAWNS ENDINGS:** To win, centralize your king and knight and create a passed pawn on the majority side. If your opponent blockades the pawn, force the exchange of knights by opposing his knight with your own. Another way would be to penetrate the other wing with your king and capture enough pawns to force a win on that side. Usually, you need two extra pawns to win, because if you have just a one-pawn advantage your opponent can sacrifice his knight for it.

To draw, exchange as many pawns as possible. The ideal would be to reduce the pawns down to one. Alternatively, create a passed pawn to keep the strong side's knight tied to its restraint.

With one extra pawn in a knight ending, your chances depend mostly on the total number of pawns on the board. A two-pawn advantage, in most cases, is a sure win.

*Knight + 2 Pawns vs. knight + 1 Pawn Ending:* While often a draw, one extra pawn is often usually enough to win with; especially if the extra pawn is a sound passed pawn, and even more so if the pawns are far apart on both wings. If the extra pawn cannot be turned into a passed pawn, or all of the pieces and pawns are on the same wing, the winning chances are considerably reduced. Then, the defender can blockade both pawns or exchange pawns and sacrifice his knight for the last pawn. The piece and king placement is also a significant factor in these endings.

*Knight + 3 Pawns vs. knight + 2 Pawns Ending:* This is often a draw, but a passed pawn makes it an almost certain win. Pawns on both wings make a win more

likely. If the pawn structures are unbalanced or not symmetrical, the strong side has better winning chances because his king has more lines for penetration.

*Knight + 4 Pawns vs. knight + 3 Pawns Ending:* These endings are nearly always won.

*Knight + 5 Pawns vs. knight + 4 Pawns Ending:* This is a rare ending, but if the pawns are on the same side, it is a sure win. At a minimum, the strong side can reduce it to a winning knight + 4 pawns vs. knight + 3 pawns ending.

**TWO KNIGHTS VS. KING ENDINGS:** Two knights do not work well together because they duplicate each other's moves and take squares away from each other. Two knights cannot force mate against a lone king (it is theoretically possible, but a player cannot force it). The only way two knights can mate a lone king is when black makes some bad moves. In contrast, if there is material on the board (even just a pawn), the mate is not that difficult. To mate, the black king must not have any escape squares (with one knight and the king cutting them off) and the other knight delivers the mate. Sometimes, the king can have an escape square, which the checking knight cuts off at the same time it delivers the final check. Mate with two knights is simplest to accomplish if the black king is in a corner. Generally, all the defender has to do is avoid the corners and the opponent's king. Three knights (an extremely rare, but possible, occurrence) is a win.

**TWO KNIGHTS VS. PAWN ENDINGS:** Two knights cannot force mate against a lone king, but if the defender has a pawn or a piece, it is possible. In most cases, the stalemating resource is eliminated. The black king is driven into a corner by the white king and one of the knights. Meanwhile, the other knight is blockading the pawn. After the black king is forced into and trapped in a corner, the other knight moves to deliver the mating blow. White needs to do this before black promotes and gets counterplay. **This is generally recognized as one of the most difficult checkmating patterns in all of**

endgame theory.

## MAJOR PIECE ENDINGS

Major piece endings are difficult to calculate because of the high number of potential checks and tactics on each move. King safety and the initiative are usually more important than a material advantage.

### ***ROOK ENDINGS***

**Rook endings are the most common kind to occur in practical play.** About half of all the endgames played in tournament chess are rook endgames. **Book knowledge of the basic rook endgames is extremely useful.** The time spent studying rook endings is time well spent.

In rook endings, the game is often decided by how many squares are controlled by the rooks. The victor, of course, usually being the player controlling the most squares.

**DRAW:** Tartakower said that all rook endings are drawn. Though obviously said to make a point, rook endings do tend to be drawish. **Rook endings (with no other pieces on the board) are the second most drawish endgame (bishops of opposite colors are first).** If both players are equal in material and activity, and they both have weaknesses, the chances of a draw (in a rook endgame) are better than the chances of one player winning.

**CUTTING OFF:** Limiting the activity of the opponent's king can be a useful aid in rook endgames. The rooks are excellent for cutting off the opponent's king from the action. Only rooks and queens can do it (unaided minor pieces cannot). The farther away the king is cut off, the better.

**VALUE:** "In the endgame, when most of the pieces and pawns have been exchanged off and the board cleared for the rook to come into action, its value increases" (Vasily Smyslov, *Rook Endings*). In the endgame, a rook is a little

stronger than a knight and two pawns and approximately equal to a bishop and two pawns. A rook and two pawns are usually better than two minor pieces (sometimes even one pawn is enough). Two bishops can sometimes hold against a rook and two pawns, especially if all the pawns are on one wing (in which case the rook loses some of its long-range advantage), but two knights almost never can hold against a rook and two pawns. **It is worth at least a pawn to have an open and active rook vs. your opponent's passive and constrained rook.**

**MATE WITH ONE ROOK:** Mates with a single rook are most often accomplished when the black king is on an open file (is checked, and has no escape square), or under similar conditions on a rank (such as a back rank mate). Against a lone king, the first step is to drive the black king to the edge of the board. Then, when black has the opposition, white's rook mates on the rank or file on the edge of the board.

The method of driving the king to the edge is the same as the final blow. It involves following the black king with the white king a knight's move away. Black will be trying to avoid the opposition, but, at the end of the rank or file, the king must come back and enter the opposition. When that happens, white checks with the rook from the far left or right, which forces black to yield another rank or file. This process continues until black is forced to the edge. If, at any time during the process, black's king approaches white's rook, he simply moves it to the other end of the same rank or file (remaining perpendicular to the coming opposition between the kings). On the outside rank or file, when the black king is forced to oppose the white king, the rook delivers mate from the side.

**MATE WITH TWO ROOKS:** Usually, this mate involves restricting the black king's ranks or files one-by-one, by leapfrogging the rooks, until the last check is mate on the edge of the board. The mate does not require the help of the white king and a queen and rook can mate the same way. With other

material on the board, white can achieve mate with two rooks by having one rook cut off the escape squares along a rank or file and the other rook delivering the mating check.

## **ROOK AND PAWN ENDINGS**

Four kinds of advantages that you can have in a rook and pawn endgame are more pawns, more active rook, more active king, and a better pawn structure. A preponderance of these advantages, without being behind in any of them, should give you the advantage.

A difference between rook endings and minor piece endings is that, **if the rook captures all of the pawns, it can mate unaided (whereas, the minor pieces cannot). Thus, the device of exchanging pawns away (as in minor piece endings) does not work in rook endings.**

Usually, to win a rook ending, an advantage of one pawn and more activity (king or rook) is necessary. In a rook and pawn ending, a strategic advantage can be more important than a material advantage. Rook endings can offer chances to draw when you are down material, so it often pays to head for one if you are a pawn (or even two) down.

**ACTIVITY:** Piece activity is important in rook endings, whether you are trying to win or draw, and rooks can move around the board much faster and more effectively than minor pieces. An active rook has play and can strike from behind a passed pawn or from the flanks. **A passive rook is tied to the defense of a pawn, used for preventing checkmate or other rook assaults, or is restricted and has no counterplay.**

**Rooks benefit from activity more than almost any other piece. An active rook is especially valuable; a passive one is almost useless.** Keep your rook active and flexible (this applies to both sides). **Do not let your rook get passive or tied to the defense.** If you do, it often becomes permanent. **Activate it and keep it active.**



Because of its power, the rook's activity is a major factor in the assessment of a position. **Post your rooks where they have the most space and freedom. Put them in aggressive positions to force your opponent's rooks to defend.** Activate your king, too.

The rook is quite unique in that its attacking and defensive powers are different. In the attack it is truly a major piece and can do much damage. Yet it is a very clumsy defender and even the king can attack it with impunity! Thus, rook activation becomes a very important part of the strategy of R + P endgames. (Edmar Mednis, *Practical Rook Endings*)

**Unlike the other pieces (that do best in the center), the rook attacks best from a distance (and usually from behind or to the side of the target).** The rook is the only piece that does not gain range by being in the center. It is actually best placed on the far edges of the board. Unless you are using the rook for protection, it is usually best to have the rook as far away as possible from the opponent's king.

The rook may sometimes give a series of checks disrupting the opponent's plans. The farther away the rook the more effective the checks; and for this reason rooks, unlike other pieces, are best placed on the distant edges of the board. (David Hooper, *Pocket Guide to Chess Endgames*)

**The rooks do best and can be most active on open files and even on open ranks.** It can be worth a pawn to have a more active rook. It is better to be down a pawn with an active rook than to have a passive rook in an equal position. **The active rook is aggressive and should either attack enemy pawns or actively support the advance of one of its own pawns.** "I recall veteran IM and trainer Bob Wade once being asked how one could judge whether a rook was actually active or not. His reply: "It should be attacking something just about every move" (Graham Burgess, *Chess Tactics and Strategy*).

**DIFFICULTY:** Rook endgames are the hardest to analyze over-the-board because the rook is such a powerful and mobile piece. There are often many tactical situations to consider and frequently immense calculations are necessary. Rook and pawn endings demand precise judgment as to when to attack and when to defend. **More mistakes are made in the transformation of a won game into a rook endgame than in any other kind of endgame.**

In one position, an extra pawn might not be enough to win, while in another position, a player can have a decisive advantage with an equal number of pawns because of piece activity. An advantage of one pawn (and sometimes even two) can be a win, a difficult win, or it can be insufficient to win.

**Pawn-up rook endings are harder to win than any other endgame except for bishops of opposite color. For this reason, it is usually a good idea to trade off the rooks if you are a pawn up** (or, if you are behind on pawns, you should try to keep the rooks on the board). Similarly, if you have the stronger position, you should usually avoid simplifying into a rook and pawn endgame. This, as with pawn-up rook endings, is because they tend to be drawish (or harder to win).

**DEFENSE:** Even though the rook is a powerful attacking piece, it is a **weak defender**. As a defender, it is clumsy and feeble. The rook can even be attacked by a king. Weaker players often err on the side of using the rook too much for defense. **It is often better to give up a pawn that is being defended by a rook, in favor of attacking an enemy pawn with the same rook.** A defending rook is usually better placed behind the enemy pawn as opposed to in front of it.

**PAWNS ON ONE WING:** When the pawns are all on one wing, in normal positions with kings on the same flank, a single pawn advantage is not enough to win. That being the case, if you are playing for a draw, it is best to have the pawns all on one side. For example, if both kings are on the kingside, you can often draw a game by exchanging all of the queenside and center pawns, even

at the expense of a pawn.

When the pawns are all on one side, the defender should try to prevent the pawn majority from getting into motion and particularly from advancing on their half of the board. If you are trying to win with a pawn advantage, it is more favorable with pawns on both sides of the board. Also, a two pawn plus on one side versus a one pawn minus on the other side is better than being one pawn up on one side and even on the other (for example, 3-1 vs. 1-2 is better than 2-1 vs. 1-1).

**ROOK-PAWN:** In rook and pawn endings, the worst pawn for the strong side to have is a rook-pawn. The reason is that the king's moves are restricted by the edge of the board and the king can be attacked from the side with no way to hide on the other side of the pawn. This is the opposite of most minor piece endings, where the rook-pawn is generally the best to have.

**OUTSIDE PASSED PAWNS:** Outside passed pawns are often preferable in many piece endgames. Yet, in rook endings, if the rook can get behind the pawns, it is not that important whether the pawns are outside or not. Center pawns can even be superior to outside pawns in rook endings.

**Rooks belong behind outside passed pawns. As the pawn advances, the rook's scope increases behind the pawn.** One of the opponent's pieces is often immobilized by being used to blockade the passed pawn.

**CONNECTED PASSED PAWNS:** Connected pawns are generally better than isolated pawns in rook endings. Connected passed pawns are much stronger than disconnected passed pawns in rook endings. The advantage of having connected pawns is that the opponent usually cannot get more than one of your pawns in exchange for their rook.

**Against connected passed pawns, the rook should, as a rule, try to move behind the more advanced one... As a rule, if two connected passed pawns have reached the 6<sup>th</sup> rank then they win on their own against a rook. (Karsten Müller, *Fritztrainer, Endgames*)**

**WEAKNESSES:** In rook and pawn endings, a pawn structure with weaknesses can be fatal to its owner. The rook can easily be tied to its defense, which will make it passive. The passivity of the rook usually results in the loss of the game.

**BEHIND:** Rooks are usually best placed behind pawns, whether they are attacking them or defending them. Rooks are the most active when behind passed pawns. Their mobility increases with each move of the pawn. The opposite is true when the rook is in front of a pawn; the mobility decreases with each move of the pawn. **A rook is usually more active defending a pawn from the side than in front of it.** Often, if your rook is behind a pawn, the opponent's rook will be in front of it. Then, each pawn move simultaneously increases your rook's mobility while decreasing his.

**Rooks belong behind passed pawns, whether they are yours or your opponent's.** This is especially true when each side has only one rook. When behind the enemy's pawn, the rook is an attacker. When behind your own pawn the rook is there to support its advance.

There are exceptions to every rule, of course. Sometimes, a rook can be more effective in front of a pawn (for example, if the pawn is on its original square or not far advanced). You can also position a rook to set up a Lucena position. Other secondary or possibly useful locations for your rook can be at the side of your pawns, or if it is being used to cut off the enemy king. The black rook can leave the file to check the white king into temporarily blockading its own pawn.

**SHORT SIDE:** Since there is an even number of files on a chessboard, a pawn is always closer to one side of the board than to the other. That means there is always a short side (and a long side). **If you are defending against the advance of a pawn, and your king is forced to go away from the promotion square, always go to the short side.** The reason is that your rook and king can get in each other's way if they were on the same side. With your

king on the short side (when not in front of the pawn), your rook can use the long side to check the opponent's king from as far away as possible without your own king getting in the way. Accordingly, **if a rook is forced to be on a rank instead of a file, it usually is better placed on the long side.**

**SACRIFICE:** Sometimes, in rook and pawn endings, in order to produce a coordinated effort of king, rook, and passed pawn, you need to sacrifice a pawn or two. It can be worth a pawn to activate the rook.

**PAWN ADVANTAGE:** The advantage of a single pawn can be enough to win; with a two-pawn advantage, though, the win is often assured. With a two-pawn advantage, even if the opponent has a positional advantage, often you can give up one pawn to improve the position while retaining the material chance for victory.

**KING:** As with almost all endgames, both the attacking and defending kings should try to get in front of the passed pawns. It is usually advantageous to try to force the opponent's king away from the action. **If the attacking king cannot get in front of its pawn, the next best place is between the pawn and the defending king.**

**If the defending king cannot get in front of the pawn, the next best place is beside it or directly behind it.** Even an active king, in rook and pawn endings, is less of a power by itself than it is in other endings. Although, when it is working together with an active rook, it becomes powerful.

**ROOK VS. ONE PAWN ENDINGS:** White usually wins easily with a rook vs. a pawn. **White can win if the king and the rook can both cover a square that the pawn must cross.** If white's king is in front of the pawn, and to one side, it is a win if it is within two files from the square of the pawn and it is white's move. If white's king and rook are behind the pawn (RP or KtP) white wins if his king is two ranks from square of the pawn.

It is possible for black to draw if white's king is not able to support the rook in efforts to win the pawn. Generally, for black, push the pawn ahead of

the king. To have any drawing chances at all, black's king has to be near the pawn and able to stay near it. To draw, the black king must be at least on the fourth rank. If not, the rook can cut the king off from further helping to assist the pawn advance. It is possible for black to win if white cannot control the promotion square.

**ROOK VS. TWO PAWNS ENDINGS:** The rook wins in most cases. White wins if his king is in front of the pawns. If not, sometimes black can win. Generally, if the player with the rook has his king near the pawns, the rook wins against two pawns and draws against three or four pawns. **The rook is usually best placed on the first rank for stopping the pawns.**

Rooks do better against disconnected pawns than minor pieces do, but they are not as good as minor pieces are against connected pawns. The farther apart the pawns the pawns are, the better it is for the rook. This is because it is harder for black to defend the pawns when they are more spread out.

In the absence of the kings, the rook will win against two connected passed pawns if the pawns are not yet on the sixth rank. If two connected passed pawns are on the sixth rank, in the absence of the kings and even if it is the rook's move (and the rook cannot win one of the pawns immediately), the pawns should defeat the rook (otherwise, they lose). **If it takes four moves or less for two connected passed pawns to reach the back rank, the rook cannot stop them.**

Two or more pawns should win if they are well advanced, their king can help them, and the enemy king is not near. Two disconnected passed pawns, in the absence of both kings, sometimes can beat a rook if they are both on at least the sixth rank. If the pawns are not connected, the rook should first attack the pawn that is supported by the opponent's king.

In these endings, **both kings should head for the pawns.** The side with the rook wants to get their king in front of the pawn. The side with the pawn wants to use their king to support their pawn's advance.

**ROOK VS. THREE PAWNS ENDINGS:** In general, the pawns must be far advanced to win. The more closely the pawns are grouped, the better for black. The proximity of the kings determines the outcome. If the pawns are isolated and the pawns' king is nearby, they win. If the rook's king is nearby, the rook wins. In the absence of kings, three pawns on the fifth rank or beyond will beat the rook. **The rook belongs on the first rank.**

The rook can beat three pawns, even if they are connected, provided its king is nearby and the pawns are not beyond the fourth rank. Just one pawn on the sixth rank gives the pawn's side good drawing chances and a pawn on the seventh rank forces the rook's side to go for a draw (or risk losing).

If the white king is in front of the pawns, he attacks with his rook from the rear or the side to force a blockade. In this case, black can draw if one of the pawns is on the sixth or seventh rank, otherwise white wins.

**ROOK VS. FOUR PAWNS ENDINGS:** Four connected pawns can beat a rook, but it is usually a draw. Winning or drawing depends on king position, whether the pawns are connected and how advanced they are.

**DOUBLE ROOK ENDINGS:** Basically, the same general principles apply to double rook endings as single rook endings. However, two rooks have a lot more power than a lone rook. Therefore, some endings that cannot be won with one rook can be won with two, and some endings that are lost with one rook can be drawn with two.

Rook endings with one rook each are usually technical in nature. If both sides have two rooks, there is a lot more tactical potential on the board. The most important difference is the potential for checkmate. With one rook, checkmate usually requires the help of the king. With two rooks, the rooks can checkmate without help.

**In the endgame, doubled rooks on the seventh rank (also called "hogs on the seventh") are a powerful force and often lead to mating attacks.**

**ROOK AND PAWN VS. ROOK ENDINGS:** Generally, if the black king gets to the promotion square, it is a draw; if not, it is lost. There are exceptions. One exception is the rook-pawn. The rook-pawn is, as usual, most likely a draw. A rook and rook-pawn (or knight-pawn on the seventh rank), with white's rook in front of the pawn and black's rook behind it, is a draw.

Winning/Drawing: If a knight-pawn is on the third or fourth rank with its king nearby, and the black king is cut off by three files from the pawn, white wins. If a bishop-pawn or a center-pawn is on the third or fourth rank with its king nearby and the black king is cut off by two files from the pawn, white wins (a knight-pawn requires three files to be cut off for white to win). If the king is supporting the pawn, the pawn is on the fifth rank and the black king is cut off from the promotion file, white wins. There are exceptions with c, d, e and f-pawns when black's king is on the short side of the pawn.

Cutting black's king off on the rank is just as effective as cutting it off on the file. Both players should be alert to both possibilities.

Short Side: As a rule, the defending king should move to the short side to allow the rook more room on the long side for checking from a maximum distance. Sometimes, with a CP, moving to the long side is possible.

Cover: In rook endings, do not advance the last pawn past the sixth rank unless it is clearly winning. You can use the pawn as a cover for your king. If you push it, you lose the cover.

**PHILIDOR'S POSITION:** The ideal position for the defending side is Philidor's Position (just as the ideal for the pawn-up side is the Lucena Position). The position is a draw for all eight pawns regardless of whose move it is.

The Philidor's Position is when black's king is in front of the white pawn and black's rook moves back and forth along its third rank (white's sixth rank). The black rook prevents white's king from getting to his sixth rank (to get in front of the pawn). So, white is eventually forced to advance his pawn to use it



as shelter to cross the sixth rank. When the pawn advances to the sixth rank, black's rook goes to its eighth rank (white's first rank) to be able to give checks at a distance. When white's pawn is on the sixth rank, and black's king is on the queening square, white cannot escape checks from behind. As a result, he does not have time to chase the black king away from the queening square.

The rook pawn is, as usual, drawish. If white has a knight-pawn, black should not let white drive his king away. Against bishop-pawn or a center-pawn black can move to the short side and draw.

**LUCENA POSITION: The Lucena position is the ideal for the side with the pawn and is the most important winning position to know. Every player should know it.** It is a win for all pawns, except the rook-pawn, regardless of who is on the move. With a rook-pawn, it is only won if the black king is cut off by four or more files (on or past the farthest bishop-file). White should always head for the Lucena and black should try to prevent it.

*The technique:* White's king is safely on the eighth rank in front of his pawn. Black's king is cut off from the pawn by one or more files. White advances his pawn to the seventh rank. Then, by using his rook, white should force black's king out of the way (the black king should be at least three moves from the pawn). Then, white puts his rook on the fourth rank and moves his king out of the way of the pawn. As black checks (probably checking from white's first or second rank), white moves his king toward black's checking rook until he gets to the fifth rank. Then, he forms a bridge with his rook by interposing it to block the check. After the exchange of rooks, or the rook moves off the file, white promotes (because black's king is too far away to catch the pawn).

If black's king and rook are on ideal squares and white's rook cannot shield his king from checks from the side, black can draw in some positions. For example, white pawn on e7, Ke8, Rf1, black Kg7, Ra2: black checks from the a-file. White's king cannot hide from the checks. If the white king approaches the

black rook, it goes to the e-file and wins the pawn. But, if the black king is on g8 (instead of g7), white wins because, after the white king approaches the black rook and the rook goes to e6, white can check from f8 with his rook and then promote the pawn. Another drawing position for black is white (pawn on e7, Ke8, Rb6); black (Kg7 or 8, Ra2). In this position, white's rook cannot cover the e- or f-files so black checks from a8 and then plays Kf7. Therefore, in order to achieve the Lucena position, it is crucial for white to locate his rook where it can protect its king from checks.

**ROOK AND PAWN VS. ROOK AND PAWN:** A draw is the expected outcome in these endings. Even when the rook is sacrificed for the opponent's pawn, the sacrificing side can often still draw a rook vs. pawn endgame.

**ROOK AND TWO PAWNS VS. ROOK:** Black can draw if one pawn is blocked by his king and the other is attacked from the rear. However, this ending is usually won for white. There are some exceptions and the win can be tedious. The main exception is when the pawns are rook-pawn and bishop-pawn. In this case, black can draw because it is difficult for white to hide from checks and blockades can be effective, but it is a difficult ending. If white can drive black's king to the 8<sup>th</sup> rank, white usually wins.

Connected passed pawns are much easier to win with than with disconnected pawns. There are some exceptions with some blocked positions. The only connected passed pawn combination that is at all difficult is the knight-pawn/rook-pawn duo. Advance the pawns in unison and with the support of the king. Usually, the best place for white's rook is guarding the pawns from the side.

When the pawns are separated, white wins when one of the pawns is on the fifth rank by abandoning the other pawn. After black goes after the other pawn, white cuts the black king off from getting back to the remaining pawn. Double RPs (a-pawn + h-pawn) can be drawn. Doubled pawns are also usually drawn. Stalemates are common in these endings.

Another winning method is to give up one pawn to decoy the defenders to transpose into a theoretically won rook and single pawn ending (such as the Lucena Position).

**ROOK AND TWO PAWNS VS. ROOK AND PAWN:** This is a win if white has two passed pawns. White usually wins if he has one passed pawn. If there are no passed pawns, it is a draw.

When one player has two connected passed pawns on one side and the other player has a single passed pawn on the other side, it is usually a win for white unless black can queen quickly or white's king cannot support his pawns.

**When you have an extra pawn on one side of the board in a rook and two pawns vs. rook and pawn ending, you should not necessarily rush to create a passed pawn.** You should wait until the passed pawn can be created favorably (for example, with your rook behind it or as a decoy to penetrate with your king on the other side).

**ROOK AND THREE PAWNS VS. ROOK AND TWO PAWNS:** only when the extra pawn is a center-pawn, is there a real chance of a win; otherwise, usually this ending is easily drawn.

**With correct play, rook vs. rook and pawn endings are drawn when the black king is able to get to the promotion square.** Rook and two pawns vs. one, or rook and three vs. two, are usually drawn by simplifying down to a basic rook vs. rook and pawn ending. The more pawns there are, though, the better the winning chances.

**ROOK AND FOUR PAWNS VS. ROOK AND THREE PAWNS:** These endings are normally drawn, especially when the pawns are all on one side of the board. **This is one of the most important of all endgames because it occurs regularly and is often the foundation for the simpler rook and pawn endings.**

The defender should keep his rook as active as possible and try to trade down to a Philidor's Position. As long as he does not get a passive position, it

should be a draw. The stronger side should avoid trading pawns down to just one side of the board because these are difficult to win.

Rook endings with four pawns against three on one wing is normally a draw. Theory and practice have shown very clearly that, if black places his pawns at h5 and g6, white is unable to win. But, if (with the black pawn at h6) white succeeds in advancing his pawns to h5, then black has problems. Sooner or later he is forced to play...g7-g6; after h5xg6 he must recapture either with his king, when he is left with two weak, isolated pawns, or with his f-pawn, allowing white a passed pawn on the e-file, or even a pair of passed pawns (e- and f-). Or else black plays... f7-f6, weakening a whole complex of light squares in his position, at the same time making it easier for white to create a passed pawn on the e-file. (Victor Korchnoi, *Practical Rook Endings*)

**ROOK, BISHOP AND PAWN ENDINGS:** Rooks work well with bishops. Usually, white should not trade off his bishop. With the advantage of a pawn, white will win about half of the rook, bishop and pawn endings, but rook and pawn endings are about 20% less likely to be won.

**ROOK VS. TWO MINOR PIECE ENDINGS:** Two pieces, in the endgame, are approximately equal to a rook plus one pawn. This varies largely with the pawn position. The pieces are usually better if the pawn is an easy target, the pieces are both bishops, or in static situations. If not, especially with passed pawns, the rook is usually better. A lot also depends on the initiative. Without pawns, it is a draw.

If the two minor pieces are a knight and a bishop, they can have trouble coordinating with each other. If the two pieces are both knights, it is even worse.

If you have a rook against two minor pieces, you should head for the endgame, whether you have the extra pawn or not. If you have the minor

pieces (with equal pawns, or down one or more pawns), avoid exchanges.

**ROOK VS. TWO MINOR PIECES AND PAWNS ENDINGS:** A knight and a bishop can have difficulty in coordinating with each other. If the play is all on one wing or in a small area, and the king is nearby, the three can usually work well together. In contrast, if the play is spread out over the whole board, the king will be too slow to help much and the rook's power will usually predominate. If the player with the rook has pawns on both sides and an outside passed pawn, he can usually win by decoying the slower pieces to stop the passer and swinging back to infiltrate on the other side.

An active and mobile rook in an endgame with few pieces on the board can be about equal to two knights or a bishop and a knight. With an extra pawn, the rook can be better than the two pieces.

**ROOK VS. THREE MINOR PIECES ENDINGS:** There are many tactical possibilities; but, if the rook can be exchanged for two of the pieces, it is a draw.

**ROOK VS. ROOK ENDINGS:** In rook vs. rook endings, the king and rook do not usually coordinate well when there is other material on the board. This is because, if the king advances too far, the opposing rook can infiltrate.

**ROOK AND MINOR PIECE VS. ROOK ENDINGS:** This is a common endgame. It is usually a draw, regardless of whether the minor piece is a bishop or a knight. However, the winning chances are better with the bishop than with the knight. Unless there are pawns involved, there are only a few exceptional winning positions possible. Those few exceptional winning positions usually involve the black king being near a corner (which white cannot force). As a result, black obviously needs to avoid the corners.

**ROOK AND MINOR PIECE VS. ROOK AND MINOR PIECE ENDINGS:** Rook and minor piece endgames are among the most important and the most varied. This is especially true in rook and multiple minor piece endings.

There is a slightly better chance to win a rook and minor piece vs. rook and minor piece ending than a rook vs. rook ending because it is possible to

achieve some kind of coordination with the rook and piece. Whereas it is difficult with rook and king (because the king is subject to attack without the protection afforded by the minor piece).

The addition of a rook to a bishop vs. knight ending does not usually change much. If the bishop is better than the knight, bishop + rook will still be better than knight + rook. Likewise, in a blocked position where knight is better than bishop, bishop + rook vs. knight + rook will not help the bishop. Sometimes, though, a knight can be helped out of an awkward situation by a rook (often by an attack on the king).

**TWO ROOKS VS. TWO ROOKS ENDINGS: “All things being equal, the player will prevail who first succeeds in uniting the efforts of both rooks in an important direction. At the very least he will nullify any other advantages which his opponent may have”** (Eugene Znosko-Borovsky, *How to Play Chess Endings*). In general, double-rook endings follow the same general guidelines as rook endings. However, because of the extra power, more play for the aggressor and more counterplay for the defender, **double-rook endings are more likely to be won than single-rook endings**. For example, in an endgame with a one-pawn majority and all the pawns are on one wing, most of the time this is a win.

**TWO ROOKS VS. ROOK AND MINOR PIECE ENDINGS: Usually, the easiest method for winning in a position where you are up the exchange is to trade rooks.** This is because the remaining rook is usually much better than the minor piece. The weaker side should avoid the exchange of their remaining rook. With two rooks vs. rook and knight, a rook exchange is good for the stronger side. However, if the weaker side ends up with a pair of bishops vs. a rook, it may be a practical trade for him. Rook + bishop pair is about equal to two rooks + knight.

**TWO ROOKS VS. TWO PIECES (THE DOUBLE EXCHANGE) ENDINGS:** Two rooks are a decisive advantage over two pieces. White always wins. The method

is to pin one of the minor pieces and then win or trap the other one. Two bishops put up a better fight than two knights do, but they still lose.

**TWO ROOKS VS. THREE PIECES ENDINGS:** Usually, this is a draw, but the pieces have a slight edge because they have more play. If the side with the pieces has an extra pawn, they will win.

**ROOK VS. MINOR PIECE ENDINGS:** **If you are up the exchange (you have a rook vs. a minor piece) try to exchange any other remaining pieces.** It is best for white to have pawns on both sides of the board, in which case if black only has one pawn for the exchange he usually loses. If the pawns are on one side of the board only, one pawn is usually enough for black to draw. White should limit the actions of black's minor piece. If black has a knight, try to restrict its moves. If he has a bishop, try to force his pawns onto squares of the same color as the bishop. Consider giving back the exchange to get a won pawn ending.

If you have the minor piece, avoid exchanging any other pieces. Try to exchange pawns down to one side of the board. Keep your minor piece active. If you have a knight, do not let it be cornered or get too far away from the king and pawns (if it is separated to the extent that it needs two or more moves to get back to the king, and it is the opponent's move, he can usually win it by force). If you have a bishop, keep your pawns off the squares of its color. You can sometimes trade off all the pawns and simplify down to a lone rook vs. lone minor piece ending. With correct play, this ending is usually drawn.

A knight and two normal (unexceptional) pawns can be equal to a rook in the middle-game, but is usually inferior in the endgame. A bishop plus a knight is usually stronger than a rook and pawn, but two pawns is usually more than enough for the side with the rook.

**ROOK VS. BISHOP (NO PAWNS) ENDINGS:** Except in certain positions, this is a draw. Lone rook vs. lone bishop is usually a draw. This ending has even fewer winning chances than rook vs. knight (because the bishop is not as likely

to lose the protection of its king as the knight is). If black's king is trapped in a corner opposite to his bishop's color, he can draw. Likewise, if black's bishop is always able to interpose when the rook checks; white cannot win. The only chance for a win for white is if black's king or bishop is poorly placed or if his king is trapped in the corner of his bishop's color.

**ROOK AND PAWN VS. BISHOP ENDINGS:** As a rule, the strong side wins without much trouble, but there are some positions that the weak side can draw. To win, white should first advance his king while restraining black's king with his rook. Then, advance the pawn.

**ROOK AND PAWN VS. BISHOP AND PAWNS ENDINGS:** The rook wins in most cases. The more pawns there are, the more likely the win. If white's king is on the same color as black's bishop, and there are other pieces or pawns on the board, it is possible for black to win as well. The general winning technique involves the penetration of the stronger side's king. Black should usually put his pawns on the color opposite of his bishop in order to prevent, more easily, the penetration of white's king. Black's best try is to keep all of the pawns on one side of the board.

**ROOK VS. KNIGHT (NO PAWNS) ENDINGS:** The player with the rook cannot force a win vs. the knight, but the defense by the side with the knight must be precise. Generally, if black can stay in the center of the board, and not separate his king from his knight; it is a draw. If white can get black into a corner or get the knight away from the king and win it, he can win. In order for white to win, black must have a poorly placed king and a poorly placed knight.

There is not much danger for black on the edges of the board, but the corners can be fatal. To trap the knight, white can try putting his rook on a diagonal from the knight with one square between them (for example, rook on d5, and knight on f3). In this position, the rook controls the maximum number of possible knight moves.

**ROOK AND PAWN VS. KNIGHT AND PAWN ENDINGS:** Rook and pawn vs.



knight and pawn endings are usually a win (but a difficult one). When there are pawns on the board, white usually wins (the more pawns, the more likely white is to win) if he can restrict the knight's mobility. Black should try to prevent the penetration of white's king (but that is rarely possible) and to keep all of the pawns on one side of the board.

**ROOK AND BISHOP PAIR ENDINGS:** In a moderately open position, the combination of the bishop pair and rook is strong.

It is a familiar principle that the player with the two bishops should not exchange a pair of bishops unless there is a pressing reason, since such an exchange of equals destroys the complementarity of the bishop pair. Less familiar is the notion that the player with the bishop pair would generally also want to retain rooks. In an open position, with play ranging across the whole board, three long-range pieces working together can generate considerable power. (Edmar Mednis & Colin Crouch, *Rate Your Endgame*)

**ROOK AND BISHOP VS. ROOK ENDINGS:** These are among the most difficult of all endgames. Even though rooks coordinate well with bishops in the endgame, this ending is a theoretical draw. Although it is a difficult undertaking for both sides, especially black (requiring over 50 moves, even for computers). White, though, has practical winning chances, no matter what the initial position. Because of the number of moves usually necessary, both sides should be constantly aware of three-move repetitions and the 50-move rule.

Black needs to avoid the sides of the board. If white can force black to the side and hold him there for enough time, white can mount a decisive assault. One slight error by black on the edge of the board can be fatal. There are many positions that can occur that, even though technically drawn, that black needs to play carefully or he can easily falter. Because of the complications involved, and unless he can play 50 moves of perfect technique, it is a good idea for black to avoid simplifying into this endgame.

**ROOK AND BISHOP VS. TWO KNIGHTS ENDINGS:** Without pawns, this ending is theoretically won for white. However, it is, technically, extremely difficult and is, for all practical purposes, drawn.

**ROOK AND BISHOP VS. ROOK AND BISHOP ENDINGS:** These endings depend largely on the activity of the rooks. The main strategic element is the blockade. If one side is behind materially, he should try to blockade the opponent's passed pawns.

**ROOK AND BISHOP VS. ROOK AND KNIGHT (WITH PAWNS) ENDINGS:** White has winning chances because of the better cooperation between rook and bishop than between rook and knight, especially if he can restrict the knight. Nevertheless, if black can exchange the minor pieces, he has drawing chances. Both sides should try to activate their pieces and restrict their opponent's pieces. White should try to penetrate with his king. White should be ready to exchange rooks, when it leads to a decisive bishop vs. knight ending.

**ROOK AND KNIGHT VS. ROOK ENDINGS:** This is usually drawn. White has fewer winning chances than he does with rook and bishop vs. rook. If white can drive or coerce black's king to the edge of the board, white can win (especially if the black king is near a corner), but white cannot force the king to the edge. Unless black's king is already near a corner of the board, this ending is rarely worth playing out.

**ROOK AND TWO KNIGHTS VS. TWO ROOKS ENDINGS:** Two knights and a rook are better off vs. two rooks than two knights are against a lone rook. So, if you have the two knights + rook vs. two rooks, do not trade rooks. This is an example of an exception to the redundancy principle (in which the side with the two rooks often does well to trade off one of the redundant rooks).

## ***QUEEN ENDINGS***

Queen endings are notoriously tricky and require a lot of patience. They

are so difficult and complex that there are no well-known theoretical positions. **Because of the queen's power, its most successful location is in the center.** Try to centralize your queen. **The most centralized queen can dominate the other queen.**

Perpetual check is a common theme and a real danger to white in queen endings. It is often the best defense for black. Sometimes, it is the only defense. Both sides should also be on the alert for mates and stalemates, which are also prevalent in queen endings.

**If you are trying to win, it is usually necessary for white's king to penetrate into the opponent's territory, in spite of the fact that his king will be subject to checks.**

It is usually useful to maneuver your queen by giving checks. This helps keep the initiative and minimizes surprises. **Checks on the diagonals are usually more useful than checks on the ranks and files.**

Unless black has a perpetual check, outside passed pawns usually win for white. Perpetual checks are extremely rare in queen endings. Consequently, if you are white, you usually do not need to worry too much about being caught in a perpetual check. The best protection from perpetual checks is by having a centralized queen.

Queen and pawn endgames have received less attention from the experts than any other type of endgame. This is because they occur much less frequently than most of the other endgames, and because they are much harder to pin down and make authoritative conclusions about.

**MATE WITH KING AND QUEEN VS. LONE KING:** The black king is first forced into a corner (or the edge of the board) by the queen. Then, the white king is brought up to assist in the mate. **The best method for herding the king is to move the queen a knight's move away from the king.** The king is then forced to retreat in the direction you want it to go. Be careful not to stalemate the king. When the king reaches a corner, an additional knight's

move by the queen will stalemate the black king. So, when the king reaches a corner, start bringing the white king up.

**QUEEN VS. ONE PAWN ENDINGS:** Normally an easy win for white, but black can create a stalemate if he has rook-pawn or a bishop-pawn on the seventh rank supported by his king and the opponent's king is far enough away. If the white queen can blockade the pawn, he wins by bringing his king to the action, because black cannot force the queen away with his lone king. The rule is **if the queen is in front of the pawn, the position is always won.**

**If black's pawn is on the seventh rank, protected by his king, and white's king and queen are distant, the winning method is to check with the queen so as to force the black king in front of the pawn to prevent it from queening.** Then, white moves his king toward the pawn. Black moves the king (forced) and white forces it back in front again. Each time the king blockades the pawn, the white king moves a step closer. Eventually, the king supports the pawn's capture by the queen.

If the pawn is on the seventh rank and it is a rook-pawn, and black's king is supporting it, it is a draw unless white's king is close enough to set up a checkmating position. If the pawn is a bishop-pawn, black can draw if the white king is not nearby, by moving to the corner when checked. If white captures the pawn, it is a stalemate because the queen is a knight's move away from the black king and therefore cannot move. White wins against a center pawn or a knight pawn.

**QUEEN VS. TWO PAWNS ENDINGS:** Unless the pawns are too far advanced, the queen wins by winning one pawn and then stopping the other one. **In one way, black is actually worse with two pawns than one because the chance of a stalemate is gone.** In order to have drawing chances, both pawns must be on the seventh rank.

**QUEEN VS. THREE (OR MORE) PAWNS ENDINGS:** It does not make much difference how many pawns black has unless they are far advanced. The queen can

capture numerous pawns, often without losing a move, because of checks.

The queen is not worth a certain number of pawns. She may defeat eight on the fourth rank, but draw against one on the seventh. Everything depends on how far advanced they are. When white's king is near enough to take part there is nearly always a mating finish. (Max Euwe & David Hooper, *A Guide to Chess Endings*)

**QUEEN AND PAWN ENDINGS:** When both sides have queen and pawns, the endings are difficult. In queen and pawn endings, **the quality of the pawns is more important than the quantity of pawns.** For example, having an advanced passed pawn is more likely to be decisive than having more pawns. Its value depends mostly on how far advanced it is. If both sides have passed pawns, it is a race. The fastest player to promote usually will have the advantage, even if he is down a pawn or two.

**Passed pawns are the more valuable in queen and pawn endgames than in any other endgame.** The reason is that the queen is better able to force a lone pawn through to promotion than any other piece.

**A useful position to know is the king in a fianchetto position with the queen on the same long diagonal as the king** (for example, pawns: f2, g3, h2, Kg2, Qc6). In these positions, the king is shielded from queen checks. It is a fortress. On the other hand, it is important to have an active king if you are trying to win.

**QUEEN VS. QUEEN ENDINGS:** Usually, these endings are drawn, but one side can sometimes win.

**QUEEN VS. QUEEN AND PAWNS ENDINGS:** In this ending, black's best hope is to find a perpetual check. White, then, tries to answer a check with a check (which would force the exchange of queens).

The decisive factor is the position of black's king. Black can draw if his king blocks the pawn. If his king is not blocking the pawn, it should be out of

his queen's way so it can more likely force a perpetual check.

To have the most control, both sides should strive to locate their queens centrally. There are few general principles. "Even in the most clear-cut example of queen and pawn on the seventh against queen alone, it is by no means easy to formulate general principles" (Paul Keres, *Practical Chess Endings*).

Queen and g-pawn plus h-pawn vs. queen endings are usually a draw if the black king is in front of the pawns. If white has rook-pawns on both sides (a- and h-pawns), but they are not too far advanced, black can draw. If both pawns are on the fourth rank or beyond, they should win. With doubled pawns, even with black's king in front of the pawns, white should win. Black can draw if they are rook-pawns. Even knight-pawns can draw in most cases. Although, doubled bishop-pawns or center pawns should be a win for white.

**QUEEN VS. QUEEN AND ONE PAWN ENDINGS:** The advantage of a pawn is rarely enough to win when the queens are on the board. Black can usually hinder the progress of the pawn by giving nonstop checks to the white king while easing his king toward the pawn between checks. Black can draw if he can get into the path of the pawn (even if there are pieces on the board).

If the pawn is passed, black usually cannot stop it unless there is a perpetual check along the way. If the black king is not near the pawn, the best pawn for white to have is a bishop-pawn because it is easier to advance to the seventh rank than the others are. Moreover, once a bishop-pawn or a center-pawn reaches the seventh rank, in most cases it is a sure win. Knight-pawns are relatively easy to advance to the seventh rank, but once there, they are not always winning. Rook-pawns are a theoretical draw (although in practice it can be difficult for black to accomplish it).

**QUEEN AND PAWNS VS. QUEEN AND PAWNS ENDINGS:** If there are pawns on the board, the ending can be extremely complicated. Endings with pawns on both sides are some of the most intricate in all of chess. An advanced

passed pawn is often more important than the win or loss of pawns.

**QUEEN AND TWO PAWNS VS. QUEEN ENDINGS:** This is usually a win unless the pawns are disconnected. If the pawns are disconnected, white can have trouble defending from checks. Even connected, the rook- and knight-pawn pair can be drawn if black's king can stay near the promotion square.

**QUEEN AND TWO PAWNS VS. QUEEN AND PAWN ENDINGS:** Taking advantage of an extra pawn in queen endings is not usually easy. Perpetual checks are always a threat (especially when there are weaknesses in the pawn structure around the king).

The extra material is relatively insignificant in the company of the powerful queens. **White should try to exchange queens.** The advantage of a pawn becomes significant with the queens off the board.

If there are no passed pawns, a draw is the usual outcome. If both sides have passed pawns, the side with the farthest advanced pawn has the best chances.

If the king is not able to hide safely on his own side, a daring move into enemy territory is sometimes the decisive plan.

**QUEEN AND PAWNS VS. QUEEN AND PAWNS ENDINGS:** These are extremely difficult endings. Being up a pawn is decisive less often than in rook endings. To win, the white king must not be susceptible to multiple checks. Two pawns should win, but it is not always easy.

If possible, try to centralize your queen. This will not only increase your queen's mobility, power and checking possibilities, but help keep the other queen out of the center as well.

**QUEEN VS. MINOR PIECE ENDINGS:** The placement of the pieces has a great deal to do with the outcome of queen vs. minor piece endings. In all but a few unfavorable positions, the queen wins against any single piece (rook, bishop, or knight). Queen vs. one or two pieces is usually a win for the queen. Three pieces can draw, and four pieces vs. queen is usually a win for the pieces.

**QUEEN VS. ONE MINOR PIECE ENDINGS:** This ending is a win for white. Against a bishop, white's queen and king should avoid the color squares of the bishop. Against a knight, all that is necessary is to avoid forks. White should win even if black has pawns, regardless of how many pawns he has (except in very rare positions).

**QUEEN VS. TWO MINOR PIECES ENDINGS:** Without pawns, normally this is a draw. **If there is nothing left to win, the queen loses some of its power.** Consequently, without pawns on the board, the queen is not quite as strong as it would be otherwise. The queen can win if the black king is against the edge of the board and in some other exceptional cases. Even more rarely, the queen can lose, especially if black has the initiative and an attack. **The queen is not quite as strong on defense as it is on offense.**

Queen vs. Two Bishops Endings: Before computer analysis discovered that this is a win for white, it was thought that it was drawn. **The ending is so difficult that no one could demonstrate a win for over 200 years.** Even with computers, some solutions can take over 70 moves. Black only draws against imperfect play. In fact, white wins 92% of the time. The best technique generally involves placing the bishops next to each other to block the advance of the white king and the king next to the bishops near the corner on the second rank. The same configuration can draw with the black king in the center of the board, but it is more difficult.

Queen vs. Two Knights Endings: The knights, unexpectedly, offer better chances than two bishops. Still, the ending is usually won. This is the most complicated of the endings of queen vs. two minor pieces. **It might seem best if the knights defended each other, but it is not.** Such a strategy would allow the king to maneuver on the undefended squares and, together with the queen, decisively separate the black king from the knights. The best method for black is to try to keep the white king away while keeping the knights adjacent to each other, close to the king and away from the edges of the board.



A typical strategy for white is to maneuver his king to a square between the two knights so that if either knight moves the other is lost.

Queen vs. Bishop and Knight Endings: Of the three queen vs. two minor piece endings, this is the least likely to draw. White wins 93% of the time. The main reason is that this combination of pieces has the most trouble preventing the approach of the white king. An impenetrable drawing blockade is possible for black, but white can usually avoid it with proper play.

**QUEEN VS. THREE PIECES ENDINGS:** A win or a draw is possible, mostly depending on the piece configuration. The best approach for the side with the pieces is to use them in a coordinated attack on the king. **The queen has great difficulty in coping with three pieces, especially when they are attacking.**

**QUEEN VS. FOUR PIECES ENDINGS:** In this case, the pieces win. The queen is helpless against the inevitable checkmate.

**QUEEN VS. ROOK ENDINGS:** If there are no pawns, white wins. To draw, black needs to keep his rook close to his king to avoid a check that forks and wins the rook. Black should try to stay in the center with his king and rook to avoid being mated. To win, white brings his queen up close to black's king and rook, and tries to force black to move his rook away from his king. White forces the black king to the edge of the board or to a corner. Then, white can try to win the rook by a series of checks or he can attempt to mate the king. This ending is difficult and can take up to as much as 31 moves to win.

**QUEEN VS. ROOK AND PAWN ENDINGS:** With pawns, white usually wins a queen vs. rook ending unless black has a knight-pawn or a bishop-pawn, which both draw. Generally, if black can support his pawn from behind with the rook, he can often draw if his pawn is on the sixth rank or beyond.

**QUEEN VS. TWO ROOKS ENDINGS:** In the endgame, two rooks are usually superior to a queen. They can win a pawn that is defended by the queen or they can promote a pawn uncontested (two maneuvers that the queen cannot use against the rooks). Two rooks can mate without the

## **help of the king.**

In general, the rooks are stronger than the queen if they cooperate with each other, possibly combining for an attack on the king, and their own king is defended sufficiently. Otherwise, the queen, with its great mobility, can be more effective than the rooks, especially if the king's pawn structure is loose enough to allow for checks from several angles, or at least one of the rooks is undefended (allowing for forking possibilities). If the rooks are passive, the queen might be able to initiate a mating attack.

Queen vs. two rooks endings are, as a rule, drawn. Two rooks are usually equivalent to a queen and a pawn. As a result, queen and pawn vs. two rooks is generally drawn, but queen plus two pawns wins. With queen + pawn vs. two rooks + pawn the rooks usually win (if the queen sacrifices, there will always still be a rook left to force the win). However, if the queen's king is restricted to the edge of the board, the rooks can win. On the other hand, if the rooks are not sufficiently protected the queen can win.

**QUEEN VS. ROOK AND ONE MINOR PIECE ENDINGS:** The queen is a bit stronger than a rook and a minor piece, but if there are no pawns, this ending, except for some unusual positions (for example, when the king can penetrate and white is able to create zugzwang), is drawn. Black usually tries to erect a fortress.

The queen is approximately equal to a rook plus bishop and pawn. With equal pawns on both sides, the queen should win (especially if the pawns are unbalanced and the side with the queen is able to get a passed pawn). It takes a rook, bishop and two pawns to beat the queen.

**QUEEN VS. ROOK AND BISHOP ENDINGS:** Usually, a draw, but white can win if black's pieces are not all active, well defended, or if white can trap black's king in a corner.

**QUEEN VS. ROOK AND KNIGHT ENDINGS:** Usually drawn, but white can win if a series of checks can pick off a black piece.

**QUEEN VS. ROOK AND TWO MINOR PIECES ENDINGS:** Without pawns, this is usually a draw, but there are many positions that favor the rook and minor pieces. When there are pawns on the board, the queen is often unable to defend a pawn against a rook and one of the pieces.

**QUEEN VS. TWO ROOKS AND MINOR PIECE ENDINGS:** This ending is normally won by the three pieces, even if there are no pawns left on the board.

**QUEEN AND PAWN VS. ROOK AND PAWNS ENDINGS:** The queen nearly always wins because the rook cannot defend against all of the threats the queen can make.

**QUEEN AND PAWN VS. TWO ROOKS ENDINGS:** This is a materially balanced ending. Activity is the key. It should decide the outcome.

**QUEEN VS. ROOK AND PAWN ENDINGS:** A difficult, but theoretically winnable ending for the queen. The side with the queen should play out all of these endings because they are especially difficult for black to draw. If black's pawn is not a rook-pawn and it is on his second rank, his best chance for a draw is usually to establish a fortress. If black's pawn is a rook-pawn and it is on his second rank, black usually will be caught in a zugzwang.

**QUEEN VS. ROOK AND TWO OR MORE PAWNS ENDINGS:** If the pawns are not connected or they are doubled, they lose to the queen unless the position is drawn with one of the pawns.

**QUEEN AND MINOR PIECE VS. QUEEN ENDINGS:** Generally, the rule in endgames is that you must be at least a rook ahead in order to win without pawns. The rule applies here, as well.

**QUEEN AND BISHOP VS. QUEEN ENDINGS:** Usually, a draw, because black can check white continually and pin the bishop, and in general make it difficult for white to get anywhere. It is possible, though, for white to get a strong attack if his pieces are active and black's king is vulnerable. The knight usually works better with the queen than the bishop, but the bishop has the one benefit in that it can move quickly to an active position. Usually, unless you

have a forced win it is not worth playing the ending out.

**QUEEN AND KNIGHT VS. QUEEN ENDINGS:** This, too, is usually drawn, but the knight does coordinate better with the queen, so it is probably a little better of the two minor pieces in this ending. The knight is also useful for defending checks; this makes perpetual checks less likely for black. White should try to force black to the edge of the board for the best winning chances.

**QUEEN AND KNIGHT VS. QUEEN AND BISHOP ENDINGS:** Unless one side has some other advantage, most of these endings are drawn. These endings are unpredictable and explosive. The initiative is the key.

The combination of queen and knight is usually thought to be more effective than queen and bishop because the queen and knight do not duplicate any moves. This is truer, though, when the position has a normal pawn configuration. If the king is exposed, the bishop and queen can be stronger than a knight and queen.

**QUEEN AND ROOK VS. QUEEN ENDINGS:** White usually wins. There are sometimes drawing chances if black can find a perpetual check or a queen sacrifice brings about a stalemate.

**TWO QUEENS VS. QUEEN ENDINGS:** There are still drawing chances, but white should win. Black's best drawing chances lie in the increased stalemating possibilities.

# 4



## *Checkmate*

*The first qualification for being a good player is to know how to checkmate your opponent.*

**—Fred Reinfeld, *How to Play Winning Chess***

## MATE

ACCORDING TO CALVIN OLSON, in his book *The Chess Kings, Volume 1*, the game of chess originated in northwest India during the late 6<sup>th</sup> century A.D. and, at about the same time, the game appears in Persian literature as well. According to Henry E. Bird, “The word Schach mat, or Shah mat in the Persian language signifies the King is dead, Checkmate” (Henry E. Bird, *Chess History and Reminiscences*).

Nothing else matters when there is a checkmate in the air. Pawn structure, material, and time, all take a back seat to checkmate.

Never play positionally when mate is obtainable and do not waste clock time looking for a mate if one is not in the position. In other words, if you know it is possible (for example, there is a weak pawn cover, outnumbered forces or a confined king), find it and execute it tactically with no regard whatsoever to positional play.

If you don't expect the position to contain a checkmate, on principle (for example, there are no weaknesses near the king, there is a solid pawn cover,

the opponent has some maneuvering room, and he has plenty of defenders nearby), then don't waste time looking for it (you cannot create a checkmate out of the blue). The trick is to be able to sense the existence of one. This instinct is best acquired by solving mating puzzles and learning the elementary checkmates and typical mating patterns. You will then start to recognize the types of positions that contain mates. At the same time, you will learn the mechanics of how to execute the final blows.

It is very seldom possible to mate the enemy king quickly if it is defended by pawn cover, has many pieces nearby for defense, and has plenty of room to maneuver. In such a position, it makes no practical sense to search for a mating combination. But, if the enemy king is confined and has few defenders and weak pawn cover, then experienced players will know that a mating combination may be possible. The same situation occurs with ideas for other types of combinations. (Sam Palatnik & Lev Alburt, *Chess Tactics for the Tournament Player*)

**VISUALIZE:** A good way to prepare a mating attack is to visualize the final mating position or mating pattern, then figure out the way to achieve it. You might need to visualize new patterns or positions as the attack unfolds and the position changes. A good imagination can help. Sometimes, you can achieve the ideal visualized position with a sacrifice. Often, when there is one mate to defend, there are several, and the opponent will get overwhelmed and start making mistakes.

**HOW:** Checkmating attacks usually involve tactics against the key defenders near the king. The process is usually to open lines in the direction of the enemy king, infiltrate with pieces near the king, restrict the king by covering the escape routes, remove or incapacitate the key defenders, and carry out the final attack.

**NAMES:** Some checkmates have names. For example: Anastasia's Mate,

Arabian Mate, Back-Rank Mate, Blackburne's Mate, Boden's Mate, Damiano's Mate, Epaulette Mate, Greco's Mate, Gueridon Mate, Légal's Mate, Lolli's Mate, Max Lange's Mate, Morphy's Mate, Morphy's Concealed Mate, Opera Mate, Pillsbury's Mate, Réti's Mate, Sea-Cadet Mate, Scholar's Mate, Smothered Mate, and many more. You should familiarize yourself with these mates. You can find them in most beginners' books and many other tactics, combinations, puzzle and instruction books. One example is Artur Yusupov's book, *Build Up your Chess, the Fundamentals*, 1.

**BACK-RANK MATES:** Often, a player overlooks being back-rank mated because he is so occupied with his own attack or plans that he overlooks it. Most back-rank mates are set up by one or more pieces cutting off the king's escape squares. Sometimes, the opponent's own pieces block the king's escape route. When looking for the back-rank mate, it is helpful to visualize the final position. "It is often the case that a player falls for a back-rank mate because he has become carried away with his own attacking ideas and has forgotten that his own king might need a bolt hole" (Neil McDonald, *Mastering Checkmates*).

**DEFENSE:** Often, you can defend against checkmates by exchanging the attacking pieces, by sacrificing, or by counterattacking.

## POSSIBLE MATES

To be able to force mate without pawns, you need to be ahead by at least a rook. There are two exceptions: the double exchange wins and four pieces beat a queen. Not all combinations of pieces can mate. Two rooks, a lone rook, two bishops, or a bishop and knight can checkmate. A pawn, bishop, knight, or two knights cannot checkmate.

# 5



## *Style*

*The primary objective of every player is to impose his own style on the game.*

**—Elie Agur, *Bobby Fischer, His Approach To Chess***

CHESS IS NOT JUST a matter of applying general principles and using theory, technique and logic. It is also a battle between styles. Two different players will look at the same position a little differently. In positions with a unique solution, players of all styles will pretty much make the same choices. Strong players with completely different styles will usually find “the only move.” However, when there are several ways to achieve a desired result (or two strong moves, one being positional and the other tactical); the player’s style becomes apparent.

Players think differently and they will choose dissimilar ways to approach the same position. **The inclination towards certain types of decisions in positions with several solutions determines the style of a player.** Objectivity is not the only way a player chooses his moves. His style also influences each decision. Even though feeling at home in certain kinds of positions does not necessarily mean that you are able to play them well; there is a relationship. People tend to do well at what they like, and vice versa.

The difference in style between grandmasters is not that large because they are all, by necessity, well-rounded and well-disciplined players. What differences in styles that do exist between them amounts to not much more



than subtle preferences.

**OPENING:** Style is significant in the opening because it sets the tone for the rest of the game. The choice of openings can have a big psychological value as well. You should not only **play an opening that suits your style**, but one that is as far from your opponent's style as possible.

**POSITION:** You must **play what the position demands**. Always play the board. **If you play according to your mood or try to impose your own style on the position, your opponent will usually punish you.** Trying to attack when you should be defending, or playing for a win when the position is even, will get you into trouble. **The best players are not limited to one style.** Even if they are not truly universal in style, they will still be willing and able to switch from a sharp attack to a slow, positional grind when necessary.

It is not always possible to steer the game into the kinds of positions that favor your style. Whenever there is one "best" move, whether it is a tactical or positional move, play it. **Style is only a factor when there are choices.** If you try to impose your style on a position that calls for a different approach, you are simply making a mistake.

**POSITIONAL/TACTICAL:** The basic division of styles seems to be positional vs. tactical, although there are a lot of varieties and combinations of chess styles. The positional group is satisfied with winning small advantages and accumulating them. The positional player will avoid combinations that are unclear and complex ideas that they are not able to appraise concretely. Positional players operate largely on general principles and calculate when necessary. They rely on logic and their memory of lines and principles. The positional player is usually concerned with security and knowledge. He concentrates mostly on not making mistakes rather than taking risks to provoke mistakes from his opponent. He takes pleasure in working a game out accurately.

The tactical player is combinative. He likes sharp, quick, complex, forceful,

intuitive positions and likes to work out complicated tactical puzzles over-the-board. He tries to infuse the position with tactical tension and is always looking for the initiative. The tactical player likes novelty and adventure. He likes to find creative combinations and brilliant attacks. The tactical player often takes risks and sometimes even disregards the basic rules of positional play. He trusts his judgment and intuition. He likes to live dangerously... at least on the board.

**AGGRESSION:** Capablanca said that it is wrong to be either overly aggressive or not aggressive at all. Of the two, it is better to be aggressive. Attacking players, in many cases though, should temper their aggression a bit. This is how Alekhine beat Capablanca in 1927. He was able to tone down his style to beat Capablanca in quiet positions.

**You can tone down excessive wildness by acquiring proficiency in endgame technique.** Not being limited to early all-or-nothing attacks allows a player to moderate his style so he can look for success in other ways. For the same reason, getting proficient with pawn structures is recommended. The wild attacker should go over his games (the ones with successful attacks) with an eye towards discovering what his opponent could have done to defend properly. In this way, the wild attacker should learn that, in many cases, he was lucky that his opponent did not find the right move.

When playing against a player with an aggressive attacking style, you should try to wrest the initiative from him. That usually causes that sort of a player to lose confidence in his game.

**UNIVERSAL:** A universal style is the ideal blend of all styles. A player possessing a universal style, theoretically, would be able to employ the appropriate style at the right time. Some say Bobby Fischer had a universal style. Others say that all grandmasters must have such a style. All strong players have styles that at least come close to being universal. The great tacticians (Tal, Nezhmetdinov, Alekhine, Shirov...) were all positionally well grounded. They needed to be, since tactics spring from good positions. The

Great positional players, such as Petrosian, Karpov, and Kramnik, also had to be tactically sharp (maybe even more so) in order to navigate successfully through the potential minefields. Still others say that nobody has such a style:

There is no such thing as a universal style. If anything comes closest to that definition, it is when someone ‘plays like a machine’—the phrase is associated with the use of computer technology. This manner of play demands unstinting hard work in the field of opening preparation, an excellent memory, and good technique for realizing an acquired advantage. (Viacheslav Eingorn, *Decision-Making at the Chessboard*)

**AGE:** Age has something to do with style. Younger players tend to lean towards sharp, combinative styles. As a player gets older, they usually develop a better understanding of positional play and, at the same time, their calculating abilities decline. So, older players tend to gravitate towards the positional styles. Older players usually have less stamina, are less likely to book themselves up with current theory, are more prone to time-trouble, and are at a disadvantage in complications. On the other hand, older players are often good at endgames and simple positions. Younger players tend to be the opposite (tactically strong, but weak in technical situations).

**OWN STYLE:** A player develops his own style, as he gets stronger. As you learn more, and the essentials become more and more automatic, you start to cultivate your own personal style. Trust in your own abilities and your personal character to guide you. The types of positions you enjoy playing will no doubt be where your strength lies. This will ultimately help to cultivate your own style. **Try to become aware of what your style is, and then go with it.** Moreover, if you have aspirations of greatness, it is essential to develop your style.

What is professionalism in our brotherhood? First of all, it is a perpetual

perfecting of skills and a creative rethinking of the chessplaying process. And, that *Drang nach* perfection—that is, a continuous drive toward improving one's results—will inevitably lead a chessplayer to such a state of mind that, figuratively speaking, he will start to feel by his fingertips, like a musician, the different positional nuances. He will acquire a self-confidence and a psychological stability which will help him to play chess under the pressure of any dramatic situation. In this way, each player will forge his own style of playing chess and create his own credo. In this way also, he will raise his level of playing chess and thus increase his enjoyment. (Mikhail Gurevich, *Queen's Indian Defense Kasparov System*)

How we interpret and play certain positions is what determines our strengths and weaknesses. **Shaping the game to fit your own style is the best way to get positions that favor your strengths and avoid your weaknesses.**

**Do not change your style when you play stronger, or weaker, opponents.** Stronger opponents are encouraged when they see a weaker player change styles out of fear or in an attempt to get lucky with an unsound attack. **Even if you need to win a crucial game, it is best to stick with your own basic style.** If anything, you might add a little aggression. Do not change your style when playing a weaker opponent either. Overconfidence can be as weakening as fear.

There is this to consider too:

Style is a cover word for a group of weaknesses that someone is trying to hide or avoid! Instead of seeking openings which lead to positions you feel comfortable in, you will be better served, in the long run, by addressing the defects in your play. If you prefer sharp positions, learn how to handle quiet ones well and create a double threat every time you sit down at the board! (Eric Schiller, *Encyclopedia of Chess Wisdom*)

**OPPONENT’S STYLE:** Consider your opponent’s style. When there are move choices (not a single best move), it is a good idea to try not to play into his strengths, if possible. It can help to know whether your opponent is playing for a win or a draw. Anything you know about the opponent can be helpful. Even knowing his current mood can help.

If you are playing an opponent with a style similar to your own, do not make the mistake of changing styles to try to make the going difficult for him. If you do, you will be making the game difficult for yourself too. Play your normal game.

**NATURAL PLAYER:** The “natural player,” according to Emanuel Lasker, relies on his judgment, as opposed to the “book player” who relies on memory and logic. Lasker advocated that a player be mainly a natural player who encumbers his memory as little as possible, and whose judgment will guide him in new positions. He said, “Very great masters are always natural players” (Emanuel Lasker, *How to Play Chess*).

**PERSONALITY:** A player’s style is not just based on his knowledge, but largely, the player’s style is based on his temperament... his basic personality. Traits such as daring, caution, boldness, optimism, pessimism, restlessness—all help form the style of the player.

**PROBLEMS WITH:** Your style can be a strength or a weakness. If you try too hard to play within your preferred style, and it conflicts with objectivity, you can get into trouble fast.

There has never been a perfect chess player. Perhaps the very idea is a logical absurdity: after all, if you adapt your style to make it harder for your opponents to beat you, the harder it becomes for you to win against *them*. So, whatever you gain in “armor” and solidity, the same amount is being lost in flair and vitality. In fact, as soon as someone can be said to have a “style,” you can also be sure that they have weaknesses. (Neil McDonald, *Chess Secrets: The Giants of Power Play*)

Sometimes, a player will choose a weak move because they let their style take precedence over their better judgment. You can occasionally use this idea against an opponent by steering him into areas where he is likely to let his style overrule his objectivity.

The problem with a positional style is that it is always possible to find more and more subtle details in a position. This can cause you to over-think and get into time-trouble. The best move might be an unusual looking move that is overlooked because of too much reliance on standard setups.

You can find the same problem with the tactician who wants to over-calculate (also leading to time-trouble). An error can occur in the calculations. Sometimes, the tactician might not spot such an error as being an antipositional or unnatural move because of his over reliance on calculation. Another problem with styles is that styles reflect a player's personality. That is hard to change!

**INFLUENCES:** You will eventually find your own style. Meanwhile, **it is a good idea to find a strong player whose style you like, and study their games and try to play like him.** Even going so far as to adopt the openings of your role model might be effective. **It is probably even a better idea to pick several strong players and try to absorb the best attributes from each of them.** The influence of these great players can be a huge contribution towards your own development.

## SCHOOLS

*The idea of a “school of play” was used by Steinitz in his book “The Modern Chess Instructor.” One of the chapters was titled: The Modern School and its Tendency.*

**—Calvin Olson, *The Chess Kings***

In chess, there are “schools” of thought. These schools are, basically, the grouping of creative tendencies and dogma that were characteristic of various eras. Within a specific school, there are shared approaches, common strategies, principles, and an inclination towards certain openings and pawn structures. Of course, not all of the players within a certain school shared all of the same styles and attitudes.

There is no universal agreement on the concept of “schools” of chess, or the ideas and dogma of the various schools. There is some overlap and blurring as to the definitions, boundaries and constituents of the various schools. There is also disagreement as to the names of the schools, and even to who belonged to what school.

Some of the most influential and most commonly accepted schools are discussed below. Among the many schools that have had supporters, but are not discussed below, are the Tarrasch School, the American School, and the Chinese School.

## ***SCHOOL OF PHILIDOR***

Francois-André danican Philidor (1726–1795), was a Frenchman. An accomplished music composer, he was the strongest chess player of his time and he was the first chess strategist. The school began in 1749 when Philidor published his *Analyse du jeu des échecs*. Philidor was the first person to identify and explain the general principles of chess and the first person to believe that a scientific approach could be used in chess research. “He was the first to define and explain the principles of chess strategy and tactics” (I.A. Horowitz, *Golden Treasury of Chess*).

One of the major contributions that Philidor made to the understanding of the game was his teachings on pawns. Until his teaching to the contrary, pawns were considered almost expendable... they were only valuable in the endgame for promotion purposes. He spoke about pawn chains and pawn centers.

Philidor pointed out the value of a pawn in the opening and middlegame. He was responsible for the famous quote: “pawns are the soul of chess or, “pawns are the very life of the game.” He recognized the importance of the endgame. His teachings ran contrary to the prevailing attitude of the time..., which was the wild attacking, and creative inclinations of the Italian School.

## **MODENESE SCHOOL/ITALIAN SCHOOL**

Concurrent with the School of Philidor, Ercole del Rio, Gaiambasttista Lolli and Domenico Ponziani, all living in Modena, Italy, contributed ideas that formed the Modenese School of chess. These three early chess authors were known as the “Modenese Masters (sometimes referred to as the “Modenese Trio”).” These were the first of the Romantics and they were all critical of Philidor. The clash between these two extremes led, in the end, to more realism in chess dogma.

Gioachino Greco (an icon of the Early Italian School in the early 1600’s) was the strongest chess player of his time (about 100 years before Philidor). His play was dynamic and typically Romantic (with numerous combinations and wild flights of fancy). His memoirs contained many annotated games.

The Early Italian School was replaced in the mid-18<sup>th</sup> century by the Italian School. Del Rio published a chess book in 1750 that advised his readers to play in the style of the older Italian School (which was to open the game up and develop the pieces).

In 1769, Ponziani published the first edition of his book, *The Incomparable Game of Chess*. In the 1782, second edition, he spelled out the principles of the Italian School of chess as illustrated by the Italian masters of the day, such as Greco. His book covered the opening and endgame, but not the middlegame. He taught that the main object of the opening is to obtain mobility for the pieces. He, as Del Rio, did not deal with pawn centers.

The third member of the Modenese masters, Giambattista Lolli, was one of



the most important chess theoreticians of his time. He added some commentary to Del Rio's book and included more opening variations as well as a chapter by Del Rio.

The changes in the laws of chess (such as giving the pieces more range) in the second half of the 15<sup>th</sup> century made the game much more active. Chess in the eye of Italian School was an art. Tactics were supreme. The open game was the ideal. This was the heyday of sacrifices, attacks, combinations and traps. Develop the pieces rapidly and come into close contact during the first few moves of the game.

The objective of the middlegame was to attack the opponent's king directly as quickly as possible and the opening was designed to serve this purpose. The initiative was sought after. The gambit was first popularized during the time of the Italian School. Defense was not understood (or even generally practiced) in those days. During this period, declining a gambit was considered a sign of cowardice.

## ***ENGLISH SCHOOL/ORTHODOX POSITIONAL SCHOOL***

Founded by Howard Staunton in the 1840's, the English School differed from previous schools in that play in the early phase of the game was not directed at the enemy king. It was considered necessary to prepare an attack by first gaining control of the center and key points, and then to attack only after an advantage had been acquired. The typical strategy was to first acquire a stable center and then to initiate a flank attack.

Staunton advised developing pieces behind the pawns and he was an early explorer of flank openings and the fianchetto. One of the central ideas was to assess a position based on its apparent features. When Staunton retired from chess in 1853 the popularity of his school dropped off quickly.

## ***ROMANTIC SCHOOL***

Right on the heels of the English School was the Romantic School (circa 1851) which popularized action and swift victories. It was, in many ways, an advanced version of the Italian School. Names like Harrwitz, Horwitz, Lowenthal, La Bourdonnais, Staunton, Bird, Kieseritzky, Anderssen and Morphy were proponents.

To the Romantics, aesthetics was almost everything. The game was all about attack and counterattack. Sacrifices, brilliant combinations, art and beauty were the order of the day. In fact, the Romantics were almost unable to restrain their wild imaginations. When a sacrifice was offered, it was more or less regarded as bad manners, if not downright vulgar, to decline it.

Defensive abilities were not at a high level. Neither maneuvering nor passive play was a normal part of the typical repertoire. Material, especially pawns, was not a major concern.

Something to keep in mind about the early players is that organized competitions were rare and ratings had yet to be invented. People played more for beauty than just to win. One beautiful game was generally considered more important than even a complete series of losses.

## ***MODERN/CLASSICAL/POSITIONAL SCHOOL***

The Modern School (circa 1872–3), also called the School of Steinitz, replaced the Romantic School. The school's origins go back to the middle of the 1700's (or the Italian School). It was founded by Wilhelm Steinitz but a big role was also played by Siegbert Tarrasch, who systematized and developed its theory. This could also be called the "Positional School."

Another source of inspiration for the school was when, around 1860, Louis Paulsen began to pioneer the idea that defensive techniques needed to be improved. Steinitz was inspired by this idea. The idea, that attack was more respectable than defense, was replaced with ideas that are more practical. Defensive methods were developed and improved.

“Steinitz did not dispense with all previous chess knowledge when developing his “modern school.” He added new methods to what had gone before and studied the play of his contemporaries, such as Paulsen, to further refine his methods” (Calvin Olson, *The Chess Kings*). The school stressed the scientific character of chess. Big advances in opening theory were made. The opening and middlegame were studied separately. It was almost as though they were not connected. Principles were developed.

One of the contributions of the Classical School was the advancement of closed games. The Romantic proposition, that chess was all about immediate victory, was replaced with the self-control to accumulate small advantages and lasting values. Positional ideas formed the foundation for forming strategical concepts.

The style advocated by the Classical School consisted of the logical development of the pieces and the avoidance of pawn weaknesses, while keeping an outlook for pawn weaknesses that could be exploited. The idea was to occupy as much of the center as possible with pawns as early as possible. Under the Classical approach, time was gained whenever possible, and it was considered correct to gain space without creating weaknesses. Unclear sacrifices were replaced with restraint.

## ***HYPERMODERN SCHOOL/NEO-ROMANTICS***

“Time passed: the ‘Modern School,’ too, became obsolete; the ‘Hypermodern School’ arrived and in its turn was transformed” (Imre Konig, *Squares*, Spring 2003). In the early twentieth century, a new style was forming. By the beginning of World War I, Nimzovich and Alekhine were clearly part of the formation of a new school. Nimzovich is credited as being the founder and was the most consistent user of its methods.

In Europe in the 1920’s, just after World War I, when all of the arts were also witnessing revolutions, the new style began to emerge to replace the

Modern School. They were called the “Hypermoderns” by the writers of the day, or as they called themselves, “Neo-Romantics.” The term “Hypermodern” was meant as a contrast with the previous school, the “Modern” School. The term “Neo-Romantic” referred to the idea that, in chess, creativity was now back in vogue.

The leading proponents of the movement were Richard Reti, Aaron Nimzovich and Saviely Tartakower. Other notable players of the day that would also be considered Hyper-moderns (at least to some extent), would include names like Rubinstein, Bogolyubov, Breyer, Tchigorin, Flohr, Duras, Spielmann, Marshall, Kashdan, Bernstein, and Vidmar. The main works of the period were Nimzowitsch’s “*My System*” and his “*The Praxis of My System*.”

The Hypermoderns started with the principles of the Modern School, critically reexamined them, and began to add many new concepts of their own. The classical ideas of opening theory, in particular, were scrutinized and some radically new ideas emerged. Creativity was back. There were contributions to the theory of strategy and semi-closed openings.

Their philosophy was to play each game on its own merits, stay alert, play intelligently, play each position the way it demands, avoid the routine, be elastic, and be objective and not to be narrow-minded. They were against a bias for, and the exaggeration of, the function of positional principles. To them, all chess positions were unique, and general principles were too mechanical to be applied rigorously.

Their main contribution was a revolutionary new theory involving the struggle for the center. “The advance of a center pawn was regarded by the Hypermoderns not only as weakening the squares on each side of it, but also, as creating a point in itself which could be attacked” (R.N. Coles, *Dynamic Chess*). They tried to show that central control with pawns was overrated, that center pawns can be weak and can become targets of attack, and that occupying the center with pawns was not necessary for central control. They believed that

controlling the center with pieces was as valid as with pawns. They showed that the idea of having pawns on e4 and d4 was not always an advantage. These pawns could become a liability if they were exposed to a flank attack (for example, from fianchettoed bishops).

The Hypermoderns showed that, often, an advantage in space is not compatible with an advantage in pawn structure. The idea of delaying the central advance of pawns until it is meticulously prepared, especially by the fianchettoing of bishops, has become synonymous with the name of Hypermodern. The idea was to allow an almost uncontested central occupation, to be followed by a destruction of the classical center from a flank attack.

With these ideas in mind, the Hypermoderns developed a variety of new openings. The classical players of the old school referred to these new openings as “Indian.” The term was derogatory, and meant that the openings were primitive and not civilized.

The Hypermoderns were not able to topple the giants. Capablanca and Lasker were not intimidated by the Hypermoderns. They continued to be successful in spite of these new ideas.

As time went by, it became clear that the Hypermodern approach gave away too much freedom in the center. The idea of letting the opponent build a center, unopposed, can be disastrous. The opponent can often set up an impregnable center. The school also started falling out of favor because they took their views to extremes. They tried to overthrow many of the good of the classical traditions along with the not-so-good ones.

The twentieth century Neo-Romantics, notably Tchigorin, Marshall and Spielmann, carried Morphy’s lessons of the open game to the point of absurdity when they attempted to render force completely subservient to aesthetics. Marshall, in particular, lacked the ability to discriminate between the beautiful and the possible, often over-reaching himself. The

Romantics, in general, suffered from an inability to discipline their imaginations. (Larry Evans, *New Ideas in Chess*)

## **SOVIET SCHOOL/DYNAMIC SCHOOL**

The Soviet School of Chess developed in the Soviet Union in the 1930's and 1940's. The political ideology that made it all possible can be traced to the mid 1920's, when the idea was born that chess should become a cultural symbol for the Soviet way of government. The School combined the best of the confident and aggressive style of the Romantics, the positional and opening ideas of the Classical and Hypermodern Schools, and improved upon all of this with insights from the likes of Tchigorin, Petrov, Jaenisch, Alekhine, and Botvinnik. It has been the main influence on the chess world ever since.

The Soviet government supported chess by including it in the school curriculum, sponsoring an immense agenda of chess activities, and promoting and subsidizing chess professionals. The Soviets halted their participation in International events while they were forming the ideas of the movement. These concepts were developed, basically, in secrecy from the rest of the world. For many years, the Iron Curtain prevented the sharing of ideas. Meanwhile, due to the support of the government at a level unmatched by any other country, chess developed faster in the Soviet Union than in the rest of the world and attained a height of scientific excellence.

This became apparent when the Curtain fell and the Soviet players started to participate in Western tournaments on a regular basis. From time to time one could see that Western players, by no means inferior by genuine chess talent, were inferior in the understanding of certain nuances, if not fundamentals. Excellent chess knowledge is probably the only common characteristic of all Soviet professionals. (Alexander Khalifman, [Chessscafe.com](http://Chessscafe.com))

The early ideas of the school were influenced by the play and insights of players from Tchigorin to Alekhine (although Alekhine was initially shunned for political differences with the state). Tchigorin taught that a player should not submit to the illusion of the “natural” move. A player should seek fresh and creative ideas.

Soviet chess players took from Chigorin a special approach to opening systems, which is expressed in a number of specific variations even in our time. Chigorin opposed dogmatism in chess... Soviet chess masters learned from Alekhine how to properly prepare themselves psychologically for games, adopting his creative and self-critical approach to games played. And, of course, they have tried, at least in some measure, to develop that exceptional combinative insight which brought fame to the genius of combinational play. (Alexander Kotov & Mikhail Yudovich, *the Soviet Chess School*)

Mikhail Botvinnik was the Soviet School’s main spokesman and spiritual leader. He systematized various middlegame positions and strategic patterns and found within them the most effective methods of playing them. He emphasized the physical and psychological aspects of tournament preparation. Kotov is another major principal. Other prominent players of the school include Smyslov, Bronstein, Geller, Keres, Tal, and pretty much all of the Soviet players through Kasparov. As you can see from these names, the Soviet School incorporates many styles of play.

The Soviet School believes that chess is a mixture of science, art and sport. It opposes rigid adherence to traditional academic principles and advocates a search for originality and innovation. Mobility is stressed as being important. Above all, the school places emphasis on dynamic positions. It promotes the use of a scientific and critical approach to solving chess problems... a trust in concrete analysis. The concrete approach is to look thoroughly at the position

to determine what it demands, and then to make plans according to those demands. Each candidate variation is calculated, evaluated and compared with the others. Each move should help to solve the most urgent problem in the position.

The Soviet School believes in a fight for the initiative right from the first few moves. The ideal method is to use all of your resources to the fullest, without compromise. The battle over control of the center is essential in the opening. The doctrine is not rigid about occupying the center with pawns. A weakness is not a weakness unless you can exploit it, or until the opponent begins to attack it. For instance, if your opponent has a smaller weakness than you have, but you can attack his first, his weakness is more important. The speed of the opposing attacks is the primary measure of the advantage.

Our understanding of positional play has matured immeasurably. Where Tarrasch taught us to avoid weaknesses in our own position while striving to create them in our opponent's position, to accumulate small advantages, to occupy open lines, and never to begin an attack without sufficient grounds, today things are sometimes done altogether differently. We might give ourselves weak spots and weak pawns, in order to distract our opponent; give up open lines, in order to save the rooks for other, more promising plans; or mount an attacking demonstration, in order to hide our real intentions. (David Bronstein, *Zurich International Chess Tournament 1953*)

The Soviet School teaches that the opening and middlegame are connected. Any idea that might work should be considered. The struggle for the initiative is crucial. A fighting spirit and an active defense (always looking for a counterattack) is the style. Material considerations are subordinate to dynamic ones.

Players of the Soviet School excel in unbalanced positions. Their



understanding of the dynamics of chess tells in complex positions. Their doctrine says there are many situations in which it would be inadequate to be guided by general positional concepts alone. By playing dynamically, you can bring together creativity and reason. The goal is not a game without danger of loss, but one in which there are complex double-edged positions. The reason is that, in modern chess, the level of competition is such that it is difficult to win without allowing counter chances.

During this period, there was a lot of importance placed on opening theory. They studied openings looking for new tactical surprises and dynamic counterattacks. The school has made big contributions to the opening theory of semi-open games.

Among the masters of the Russian school are to be found many styles of play, ranging from the scientific strategic play of Smyslov (who has been likened to Capablanca) to the violent attacking play of Tal. To generalize is therefore dangerous, but by and large it can be said that certain factors, or at least attitudes of mind, are common to almost the whole school of Russian chess. Above all, they place the stress upon dynamic positions; for this reason Smyslov, for example, at his peak won and lost more games than Capablanca ever did. The classical conceptions of strategy had been widened and enlivened by the Hypermoderns, but as Alekhine proved, they had not been overturned; the weak points and the strong points still emerged as landmarks to guide the player in his conduct of the game. The dynamic chess now practiced by the Russians shook even these time-honored guides. The search for a dynamic position led the Russians to play at times in a manner which would not only have horrified Tarrasch but would even have startled the Hypermoderns themselves. (R.N. Coles, *Dynamic Chess*)

## **INDIVIDUAL STYLES**

The development of chess through the years has been made possible by the collective work of generations of strong players, each adding to the body of chess knowledge. Although, most of the time, it was the style of one player (often the World Champion), who shaped the fashion of the particular era.

Below is a discussion of the styles of 26 of some of the greatest and most influential players in history. The players that are included are the World Champions and a few other top players who were discussed in the sources from which this book is based. The choice of which players to include or exclude was a somewhat subjective one, although it was limited by who was discussed in the source material. Some of the more modern Superstars were just not mentioned (or rarely mentioned) in these sources. The players were chosen, primarily, to discuss their individual styles (along with some of their achievements, some anecdotes, and some accolades from other great players). The overriding criterion for the selection was a consideration for their contributions to the principles and the knowledge base of the game of chess.

Reading about these players and their achievements will certainly inspire you. Most likely, as a result you will be motivated to study some of their games.

## ***LOUIS LA BOURDONNAIS (1795–1840)***

*Unofficial World Champion (1821–1840)*

Even though Francois-André Danican Philidor (1726–1795), a Frenchman, was the strongest player of his day, most experts agree that Louis Charles Mahe de La Bourdonnais (also a Frenchman, and an aristocrat) should be considered the first real World Champion (although unofficial, since the title had not been invented yet). The reason most experts consider La Bourdonnais to be the first true World Champion is because he traveled outside of his country to compete at the highest levels, whereas Philidor did not. La Bourdonnais was born the year Philidor died. In 1821, and for 20 years thereafter, La Bourdonnais was

considered the best chess player in the world.

There was no other known player of La Bourdonnais' caliber, and he no real competition until 1834 when he was challenged by the Irish master, Alexander McDonnell. McDonnell was one of the strongest players in England. They played a series of six matches (85 games). This was the first time a series of chess matches had been played and published. La Bourdonnais won the matches with the score of 45 wins, 27 losses and 13 draws. The match substantiated La Bourdonnais' dominance of the chess world. La Bourdonnais also established the world's first chess magazine, *Le Palamede*. Paul Morphy considered the match games between La Bourdonnais and McDonnell to be the finest games in the history of recorded chess.

## **HOWARD STAUNTON (1810–1874)**

*Unofficial World Champion (1843–1851)*

Howard Staunton and the French chess champion, Charles Fournier de Saint-Amant (who not only succeeded La Bourdonnais as the top French player, but also revived La Bourdonnais' magazine, *Le Palamede*), were considered to be the two strongest chess players in the world in the early 1840's. In 1843, Staunton, by defeating Saint-Amant in a match (by the score of 13-8), became the strongest known player in the world at that time. The final game lasted 14 hours (Staunton referred to his opponent as "decidedly slow"). In those days, players would sometimes spend up to an hour or two on one move. The title still had not been established, so his recognition as the World Champion is unofficial.

Further substantiation of Staunton's dominance was that he also defeated other strong masters of the day, including Bernhard Horwitz and Daniel Harrwitz. He defeated Harrwitz, who was a strong enough player to draw a match with the legendary (and soon to be the next unofficial World Champion)

Adolf Anderssen, with odds of pawn and two moves!

Saint-Amant was not as strong as La Bourdonnais, and Staunton was a little stronger than Saint-Amant. Some say that Staunton was not even of grandmaster strength, but he was so strong that he was able to give odds to most of the strongest players of the day (otherwise, he would win convincingly). Players from other countries may have been as good, or better, than Staunton (including József Szén, of Hungary), but they did not play against Staunton. Later, Staunton also gained notoriety by avoiding a match with Paul Morphy.

Staunton wrote several chess books. In 1847, he published his famous book, *Chess Player's Handbook* and he published his *Chess Player's Companion* in 1849. He wrote several more books later plus revisions of the earlier ones. He was the editor of the first English chess magazine, in which he would frequently insult his rivals. He had a reputation for antagonizing people.

He designed the famous “Staunton” chess set (which is still the standard design to this day). He organized the first international chess tournament in history (London 1851). Prior to 1851, chess tournaments did not exist. Strong players only played each other in matches or casual games. He put a lot of effort into trying to standardize the rules of chess. Outside of chess, he edited a complete edition of plays of Shakespeare and wrote a history of the British public school system.

Staunton was no one's disciple or pupil. Everything about chess that he learned, he learned himself. Staunton seemed to be ahead of his time with regard to the openings. His use of ‘flank’ openings was not to be popular until seven or eight decades later, and his use of indirect control of the center was not understood until over a hundred years later. He made some use of the fianchetto for strategic reasons. In many ways, one could consider him a pioneer of the Hypermodern School. Fischer said that Staunton was the most profound opening analyst of all time. He said that his games were completely

modern and that he deserves to be on the list of the top ten best chess players of all time.

In David Levy's biography of Howard Staunton (*Howard Staunton, 1810–74*), Paul Morphy is quoted (regarding Morphy's assessment of Staunton as a player):

His knowledge of the theory of the game was no doubt complete; his powers as an analyst were of the very highest order; his *coup d'oeil* and judgment of position and his general experience of the chess board great; but all these qualities, which are essential to make a great chess player, do not make him a player of genius. These must be supplemented by imagination and by a certain inventive or creative power, which conceives positions and brings them about. Of this faculty, I see no evidence in the published games of Mr. S. In a given position, where there is something to be done, no matter how recondite or difficult the idea, Mr. S will detect it and carry out the combination in as finished a style as any great player that ever lived, but he will have no agency in bringing about the position. Therefore, in his best day, Mr. S. (in my opinion) could not have made a successful fight against a man who had the same qualities as himself, and who, besides, was possessed of the creative power above mentioned. Such were Anderssen of Germany, McDonnell of England, and La Bourdonnais of France. (Paul Morphy, *Howard Staunton, 1810–74*, David Levy)

Howard Staunton died on Paul Morphy's birthday June 22, 1874.

## ***ADOLF ANDERSSSEN (1818–1879)***

*Unofficial World Champion (1851–1858)*

*The most brilliant player of all time*

—Anthony Saidy, *The Battle of Chess Ideas*

In 1851, Anderssen beat Staunton in a match. Staunton claimed that he was exhausted from illness and under tremendous pressure from business at the time, and he unsuccessfully campaigned for a rematch. Previous “unofficial” World Champions were debatable, but almost everyone agrees that Adolf Anderssen was clearly the strongest player in the world in 1851. One form of confirmation is that he won the first International Chess Tournament in London, in 1851 (defeating, among others, Staunton and Kieseritzky). He also won two other great international tournaments in his career: London 1862 (ahead of his main rival, Louis Paulsen) and the strongest tournament ever held (to that time), Baden-Baden in 1862. He continued to play at the highest-level well into the late 1860’s. “Adolph Anderssen was a chess Superman” (Iain Reeve, *Chess*, June 2007).

He had a vivid, deliberate and exciting way of playing. His style was made up of dazzling creativity, great daring, resourcefulness, imagination, aggressive optimism, remarkable tactical abilities, and incredible attacking skills. He was the leading symbol of the Romantic School and the most Romantic of all of the subsequent champions. His preference was for gambits (for example, the King’s Gambit and the Evans Gambit). He thrived in fluid, open positions. “He played some of the finest sacrificial games ever seen and is still regarded as one of the game’s greatest tactical magicians” (John Walker, *Winning in the Opening*).

At least two of his spectacular games will live for eternity: The Evergreen Game, Anderssen-Dufresne, Berlin 1852 (Evans Gambit) and the Immortal Game, Anderssen-Kieseritzky, London 1851 (Bishop’s Gambit). The Immortal Game was a friendly practice game played in the foyer before the London 1851 tournament. Anderssen took less than an hour to make all of his moves in that game.

Morphy is usually credited with being the first to understand the importance of development, but Anderssen’s concept of development in the opening was as good as Morphy’s. Like Morphy, when his lead in development

created enough of an advantage, he attacked. Anderssen's forte was the direct, and often brilliant, kingside attack. He was bold and adventurous.

He always fought to create positions with a lot of tension. He was a brilliant attacking and combinational player. He would attack or sacrifice with or without justification. He also had a good positional feel (for example, he was famous for exploiting his opponent's bad bishops).

In his day, defense was in its primitive stages of development. Against an attacking genius such as Anderssen, his opponents were often overwhelmingly demolished. He was no academic. He was not concerned with the "truth." He sought only beauty.

No one has ever played chess like Adolph Anderssen played it, nor won as much fame and glory for his charismatic style. Anderssen's hallmark is the direct (and often spectacular!) kingside attack, executed always with aggressive optimism, resourcefulness and daring. In Anderssen, moreover, this relentless drive to checkmate is backed up by explosive tactical brilliance, leaving in its wake combinations that have filled anthologies for generations. (Sid Pickard, *the Chess Games of Adolph Anderssen*).

Anderssen first became famous as a composer of chess problems and his style reflected it. He could find an elegant move in the middle of complete turmoil, or a quiet move in an outrageously sharp position.

Anderssen was a problem composer as well as a player. He brought a composer's instincts to the board, a taste for elegance in the midst of violence, for the surprising effect of a quiet move in a loud position. Perhaps this is what prompted Reti (himself a great composer of endgame studies) to judge Anderssen as Morphy's superior in the area of 'imagination. (Macon Shibut, *Paul Morphy and the Evolution of Chess Theory*)

In 1858, Anderssen was beaten by the dazzling Paul Morphy (who came

and went in a flash). Anderssen was out-played by Morphy's deeper understanding of positional play. Anderssen, too, was a strong positional player, but he was unable, or unwilling, to change his style in order to neutralize Morphy. "The possibility of modifying his own style did not occur to Anderssen; psychologically he could not change" (Reuben Fine, *the Psychology of the Chess Player*).

When Morphy left chess, just two years later, Anderssen was again generally considered the best player in the world. After the Morphy defeat, his play improved. He took the game more seriously and added more positional play to his style. He remained at the top until 1866, when Steinitz beat him in a match. He was one of the most active players of his day. He was always willing to play anybody. He may well have also been the best tactical player in history.

Steinitz' thought very highly of Anderssen: "He has been one of my most dangerous opponents, and I still believe that in 1866, Anderssen was stronger than I, but he hadn't had the chance to practice enough. Generally speaking, I think Anderssen was a greater genius than Morphy. (Tim Krabbé, [Chesssafe.com](http://Chesssafe.com))

## ***PAUL MORPHY (1837–1883)***

*Unofficial World Champion (1858–1860)*

*Morphy is popularly looked upon as the greatest chess player of all time.*

—Reuben Fine, *The Psychology of the Chess Player*

The least disputed of the "unofficial" World Champions, and maybe the best player of all time, was Paul Morphy. There is ample evidence of this claim, not the least of which was his convincing defeat of the colossal Adolf Anderssen in a match in Paris toward the end of 1858. The designation of an official title was still almost thirty years from being established, but almost



everyone, then and now, considers him to be clearly the best player in the world at that time.

The best way to put it is perhaps, as Max Euwe said in his book, *The Development of Chess Style*, “The Anderssen era was interrupted by an apparition of dazzling brilliance.” Morphy burst on the scene, destroyed everybody, and retired in less than a year and a half. The time from when Morphy beat Anderssen until he retired was only five months, after which Anderssen resumed his prominence as the best player in the world.

Morphy was one of the genuine child prodigies of chess (like Capablanca, Fischer, Reshevsky, and a few others), but, unlike these other precocious players, chess was not “his life.” Another fact to set him apart from these other great prodigies is that he reached the level of mastery before having played any strong players. He learned the game when he was about eight years old. His genius was apparent even at that age, as he was easily beating his opponents, right from the start.

By the age of nine, he had beaten General Winfield Scott. At twelve years of age, he won two games and drew another with the great master Johann Lowenthal. By the age of 13, he was one of the best players in the country and he was beating almost everybody. He played very little chess, though, between the years of 1850–1857, devoting his time to studying law.

In 1857, at the age of twenty, Morphy won the first American Chess Congress in New York (which included the strongest masters in the country, such as Charles H. Stanley and Luis Paulsen). This victory established Morphy as the strongest player in America. After the tournament, Morphy played a match with Charles H. Stanley, who was the reigning and first official U.S. Chess Champion. Stanley had held the title for 12 years. Interestingly, Morphy, at the age of eight, had witnessed Stanley’s winning of the championship (over Eugene Rousseau), which was held in New Orleans. Morphy won the match with Stanley by the score of 4-1 and became the second U.S. Chess Champion

(Morphy had given Stanley the odds of pawn and move in that match).

The first American Chess Congress was a knockout system and draws did not count. Morphy defeated all of the other players that he played. He only lost one game (out of 18). That loss was to Luis Paulsen in the final round of the tournament. Morphy played Paulsen an eight-game match in the final round of that tournament, winning by the score of five wins, one loss, and two draws.

Paulsen was a slow player who several times spent over an hour on a move and often averaged a half hour per move. Morphy, on the other hand was a fast mover (usually only taking a minute or two per move). In the second game with Paulsen, after Paulsen took 30, 45, and 55 minutes respectively on three consecutive moves, Morphy got so upset that he blundered the order of a combination and almost lost an otherwise superb game (drawing it instead). He played poorly in the next two games (losing one of them) because of his infuriation with Paulsen's slowness.

In connection with Paulsen's deliberation, W.J.A. Fuller... tells a story of how, just before the famous game, Morphy went down to the restaurant with him and took a glass of sherry and a biscuit. "His patience was worn out by the great length of time Paulsen took for each move. His usually equable temper was so disturbed that he clenched his fist and said —'Paulsen shall never win a game of me while he lives'—and he never did." (Phillip W. Sergeant, *the Unknown Morphy*)

That incident took place just before their 6<sup>th</sup> game. Morphy's famous queen sacrifice in their sixth game took Morphy 12 minutes to decide on and took Paulsen 75 minutes to accept.

Earlier in the tournament (before their run-ins), Paulsen (a famous blindfold player) gave a blindfold exhibition and asked Morphy to be one of his opponents. Morphy accepted with the stipulation that he, too, play blindfold. The result of this double blindfold game was Morphy's announcing mate in five

on his 28<sup>th</sup> move.

Morphy, who was fluent in four languages, graduated from college with a law degree cum laude, but he was too young to start on his law career (it was necessary to be over twenty-one years old to practice law in Louisiana, and he was only nineteen). That being the case, for sixteen months he played chess. During that time, he easily outclassed and crushed all of the strongest players in the world (the ones that would dare to play him, that is). His dominance was clear. He not only beat his opponents, but he did it effortlessly.

In America, he had no equals. He had to give knight odds in order to get a good challenge. In Europe, he beat Anderssen 8-3, Harrwitz 5-3, Barnes 14-6 and Lowenthal 10-4. He defeated all of the strong masters of the day, except Howard Staunton, who some say made a series of excuses to avoid playing him (even after Morphy went to England to play him). In all fairness though, Staunton was under contract to finish his annotated edition of Shakespeare's plays (he reportedly tried to get a release from his publisher to play the match, but was denied). Experts at the time and today believe that, had a match between them taken place, Morphy would have massacred Staunton.

Chess historians and great players agree that no one has ever matched Morphy's meteoric and brilliant career. All of Morphy's public play took place in just six months (from the end of June to the end of December 1858).

Morphy had a modest demeanor and was a courteous winner. He did not gloat over his vanquished opponents nor boast about the games. He played with a deadpan look and made it all look entirely effortless.

Combinations, sacrifices and threats must have flashed in his mind during a game like showers of sparks. Where another would have seen nothing, where everything appeared boring and void, he found transfused hues of unexpected attacks. Out of nothing he created magic worlds of irresistible assaults. (Eugene Znosko-Borovsky, *Paul Morphy and the Evolution of Chess Theory*, Macon Shibut)

There had been rumors in Europe about Morphy's conquests in America, but Anderssen was not worried. They met in Paris in late 1858. Morphy won impressively. Anderssen's combinational and attacking talents were equal to Morphy's, and he was maybe even a little more creative, but Morphy outplayed him positionally. Positional play was almost entirely unknown at that time. Other than possibly some influence from the teachings of Philidor, Morphy's positional play was intuitive. Most experts consider him the first positional player.

His primary advantage, positionally, over Anderssen (and the others of the day) was his understanding of the importance of development and control of the center. The idea of rapid development was known before Morphy, but, because he considered the rapid mobilization of forces and a lead in development to be the keys to getting an opening advantage, he did not stray from it.

He knew how to build up the position to make the combinations appear. He knew when to attack and he could play positions that did not call for a direct attack. These were concepts that were unknown to Anderssen. Morphy knew how to play in accordance with the demands of the position and did not try to force his own preferences on the position.

Morphy's attacks were generated from the gradual build up of the position. On the other hand, Anderssen's attacks were more spontaneous. The final score of the 11-game Morphy-Anderssen match was 8-3, Morphy. The match lasted seven days. They played without time controls. The games lasted between 30 minutes (for the shortest one) to eight hours (for the longest). A quote from Anderssen after the match pretty well sums it up: "Morphy's play seemed to me like something from another world" (*Paul Morphy, A Modern Perspective*, Valeri Beim). When asked why he did not play as brilliantly as usual, Anderssen answered, "Morphy will not let me" (Larry Evans, *Chess Catechism*).

After the official match, Morphy and Anderssen played some skittles

games to get some photographs of the match. The score of the three hours of skittles games was 5-1 in favor of Morphy.

Morphy's style was that of unerring precision punctuated with bursts of brilliant attacks and combinations, sometimes many moves deep. He understood the importance of development and centralization, and he knew how to play open positions. Unlike the Romantics before him (who would sacrifice first, and ask questions later), he knew how to wait for, and capitalize on, mistakes by his opponents (such as a loss of time or poor piece placement). His moves were not only brilliant, but they were also extremely accurate. They were the model of perfection and creativity.

Unlike the other players of his time, if the position called for it, Morphy could get a slight advantage and finesse it slowly to a win with good technique. He would exchange queens just to win a pawn and go on to win the endgame. He did not attack the king unless the king's position had been weakened or he had the necessary preponderance of force directed at the king. This is why many of the players of his day disapproved of his style. Because they did not understand what he was doing, they thought his play was too dry.

The idea of sacrificing pawns to open up lines was known before Morphy, but, unlike his predecessors, he would only sacrifice when he was sure it was advantageous to do so. Intuitively, he understood the strategies behind the openings he played, especially the open games and gambits. He also had an intuitive sense for positional play and combinations.

The Romantic players, generally, had short-range ideas of attack and defense in mind when they moved. Morphy had a long-range strategic concept in mind, and his moves were based more on general concepts than were his contemporaries' moves. His long-range strategies were based primarily on the pawn structure. Even his sacrifices were based on sound principles.

While exhibiting an approach reminiscent of the Italian School, he also had a dynamic style. He always played to win the initiative (a key factor of dynamic play). He is considered the first "dynamic" player in history and, in

many ways, the founder of the modern dynamic style. He had a natural feel for the dynamics in chess. No one before him had understood and made use of the dynamic elements of the game at his level.

It was not until Capablanca, more than fifty years later, that a player displayed his level of understanding of the coordination of pieces, and almost sixty years later, until Alekhine, that anyone played as dynamically. Anatoly Karpov said of Morphy: “He had a brilliant sense of how to get the initiative, from which he sacrificed pieces after due preparation, to say nothing about sacrificing pawns” (Anatoly Karpov, *Anatoly Karpov’s Games as World Champion 1975–77*, Kevin o’Connell & David Levy).

Morphy would obtain the utmost activity for his pieces by opening lines. He knew that, with the lead in development and open lines, the opportunity for attack would logically appear. He knew that a lead in development becomes more significant the more open the position becomes. His method was to get a lead in development, open the position by exchanging or sacrificing pawns, gain control of the open lines, open a center file, and attack with superior force before his opponent could muster up a defense or counterattack.

He understood the value of time. He used time to develop superior, early striking power. He realized that time was more important than material in the opening. His pieces were developed quickly in the center, which left his opponent no time for his slow buildup of forces. He could calculate variations better than any of his contemporaries could, but because he possessed such a remarkable intuition and deep understanding of the game, he rarely needed to use this talent.

He also understood the value of avoiding a premature attack. Morphy only attacked after developing all of his forces (this was a known principle from the Italian School). More than any of his contemporaries, he appreciated the importance of development. He said, “Help your pieces so they can help you.” He understood how control of the center benefited the attacker (because of

greater mobility), and he fought to gain control of it. He also was a superior defender. He won several games by stopping an unsound or premature attack (usually with a counterattack).

Morphy was one of the best endgame players of his time (probably the best), but he had little experience with it, since most of his games were decided beforehand. Many of his games that reached the endgame were games in which he had given odds to begin with.

Many experts believe that Morphy was so good that he would have beaten any other player in history. He was way above all of the players of his time. The difference in strength between him and his contemporaries was the largest in history.

He had an incredible memory. He is said to have memorized the entire code of laws of the state of Louisiana. One day, Morphy played eleven games (winning them all). When he returned to his room, he replayed and analyzed, in detail, all of the games he had played. He was also a phenomenal blindfold player (only losing one blindfold game in his life) and often played blindfold simultaneous exhibitions (as many as eight games at a time). In these games, he also showed the same kind of precision and brilliant combinations as in his serious play.

Everything seemed to be effortless for him. He never seemed to be concerned about the games and even distractions did not bother him. He often engaged in conversation while playing these simultaneous games. He, on at least one occasion, even read a book while waiting for an opponent's move.

He only played about 75 serious games in his entire career, did not write any books (only a few short notes) and he was not interested in teaching his techniques. Yet, his play inspired the later formulation of opening principles, which are still considered correct to this day. He did not study much, but he was at least somewhat familiar with the chess literature of his day (he is known to have had at least three chess books prior to 1857).

“He had conquered Europe’s best, entertained enraptured ladies in their

opera boxes, and become the only chess hero ever to be borne on the shoulders of citizens through the streets of Paris” (Anthony Saidy, *The Battle of Chess Ideas*). He returned to New Orleans in May of 1859 and issued a challenge to give odds to anyone in the world. After receiving no response, and only five months after defeating Anderssen, he retired from chess. He probably would have continued to lead the chess world for decades, but his whole career had lasted only sixteen months (only six of which were in public play).

Most of Morphy’s games were played with him giving odds. Because his true strength was never really tested, it is difficult to say just how strong he was or could have been.

His short career had changed the way people understand the game. His style influenced the players of his generation (Steinitz, Bird, Blackburne, and many others), but it was many years later before his methods were fully understood. His style continues to influence players; he is still considered the unsurpassed master of the open game, and his masterpieces are still enjoyed to this day.

Paul Morphy is considered by many connoisseurs of chess ability to have been the most brilliant player that ever lived. His genius for attack, and his flair for sparkling combinations are acknowledged even by his most vehement detractors. Morphy at his best (and that is 99 and 44/100ths of the time) is a delightful entertainer. (Irving Chernev, *the 1000 Best Short Games of Chess*)

A popularly held theory about Paul Morphy is that if he returned to the chess world today and played our best contemporary players, he would come out the loser. Nothing is farther from the truth. In a set match, Morphy could beat anybody alive today... Morphy was perhaps the most accurate player who ever lived. He had complete sight of the board and never blundered, in spite of the fact that he played quite rapidly, rarely



taking more than five minutes to decide a move. (Bobby Fischer, *Chess Strategy and Tactics*, Fred Reinfeld & Irving Chernev)

## ***JOSEPH HENRY BLACKBURNE (1841–1924)***

Joseph Henry Blackburne was one of the top half dozen players in the world for over 20 years. He was the English Champion 1868–69 and was known as the “Black Death.”

Even though he was about Morphy’s age, he did not start playing chess until he was 18 years old (at the time of Morphy’s European tour). He never played Morphy. Although, when he was still a young man, he nearly equaled Morphy’s blindfold chess feats by playing six blindfold games simultaneously. By the 1870’s (and until the 1890’s) he was one of the top five players in the world. The others were Steinitz, Zukertort, Tchigorin and Tarrasch. He is considered to have been one of the best players of the Romantic era.

His tournament record was phenomenal. He was considered the top player of the day for a long time. He was one of the best endgame players of his time. He was known for his nerves of steel. He was also a composer of chess problems and was known as a fast solver of problems.

His memory was phenomenal. He was once showed some games that he had played some 37 years prior (and he had not seen them since). He was able to remember the details of the games and the possible variations. He once memorized 30 difficult, unusual and large words that were read to him only once. He read them backwards and forwards without error and even remembered them the next day.

He was a great attacking and combinative player. He generally favored a direct attack on the king (in typical Romantic style), but the majority of his attacks were sound. He is well remembered for his successful come-from-behind mating attacks, often based on a clever swindle. He was also the top endgame player of his time.

As a tournament player, Blackburne never has had an equal, if regard be paid to the long period during which he has held his place in the first rank... Indeed, it is a noteworthy circumstance that his most brilliant combinations have been produced against his strongest opponents. (P. Anderson Graham, *Blackburne's Chess Games*)

He played over 50,000 games. Many of them were blindfold simultaneous exhibitions. He was the leading blindfold player of his day. Once, playing blindfold, he announced mate in 16 moves... and did it. He often talked, joked and drank whisky during his exhibitions (something that was unusual in its day). "When Blackburne played blindfold chess, he concentrated so profoundly that he lost the senses of touch, taste, and smell" (I.A. Horowitz & Fred Reinfeld, *The Macmillan Handbook of Chess*).

Once when Blackburne was giving a simultaneous exhibition, his opponent had ordered and just been served a glass of whiskey. Instead of making his move, Blackburne drank the whiskey and went on to the next board. How I would have loved to have known him personally! He was what Edith Sitwell would call a (typical) English eccentric, detesting (in chess) a dull, plodding position, enjoying especially to play blindfold (many games simultaneously) with spirit and dash. His style (intuitive, imaginative) at best was brilliant with aggressive talent, and he could make the most astonishing, breath-taking moves with the greatest of ease (a strong hand and a sparkle in his eye). (Anthony Santasiere & Ken Smith, *The Romantic King's Gambit*)

## ***WILHELM STEINITZ (1836–1900)***

*Unofficial World Champion (1866–1886), World Champion (1886–1894)*

When Steinitz was young, he was inspired by the play of Morphy and

Anderssen. In the early part of his career (1862–1873), he was a follower of the attacking school and played in the Italian style with flash, daring and creativity. In fact, he was even called “the Austrian Morphy.” In his early days, no game made him happy without at least one piece-sacrifice. However, all that changed suddenly. The ties with the old school were sharply broken and the changes were permanent. He rebelled against the unsound character of that school and became “the father of modern chess.” He earned that title by introducing positional play to the Romantic era and by developing a school of positional play that became known as the Classical School (also called the Modern School or the Positional School).

Stories differ as to his personality. Accounts range from him being a quick-tempered, disagreeable, grumbling, contentious, argumentative sort, to that of a happy, bubbly, courteous, modest, good sport, and a carefree kind of guy. Physically, he was five feet tall, bearded, and had a powerful upper body.

In 1866, Steinitz beat Anderssen in a match. This was not an official title match, though, since the title had not even been established yet. Steinitz, though, did become the first official chess World Champion (in 1886) by beating Zukertort (who was the winner of the London 1883 tournament) in what has always been recognized as the first official title match.

Later in his life, however, Steinitz considered himself (retroactively) to have been, in reality, the World Champion ever since he had beaten Anderssen in 1866. He reasoned that, since Morphy had retired from chess, he was truly the World Champion. However, the chess public did not see it that way at the time (they still considered Morphy to be the best). There was no mention of any kind of championship in the terms of the agreement or the publicity about the Anderssen-Steinitz match. Although, Anderssen stated, after the match, that Steinitz was even better than Morphy. Regardless of whether that was true or not, Steinitz was the strongest active player in the world for about 33 years.

Steinitz defended his title against Mikhail Tchigorin and then once again against Isidor Gunsberg. He was undefeated in match play until he lost the title

to Emanuel Lasker in 1894. He failed to recapture the title in a re-match in 1896–7.

Until about 1873, Steinitz, who was at this time clearly one of the best players in the world, played attacking chess in the style of his contemporaries. Then, around 1873, the Romantic style of chess was, all of a sudden, too wild and disorderly for him. The gambits, unbalanced positions, sacrifices and daredevil piece-play were in need of taming. His style abruptly changed and he became a positional player. Such a radical change of style would normally be a setback for a player, but, for Steinitz, it increased his strength.

To his contemporaries, his slow-moving maneuvering did not make any sense. They were used to clear-cut, uncomplicated attacks and combinations. The idea of accumulating small advantages was foreign to them. Steinitz was formulating the fundamentals of the science of positional play.

It was plain in every page of his writings how greatly he delighted in a pretty game, no matter who played it. Nor was it any taking leave of wild chess oats when he resorted to what he once called “trigger chess,” a pulling back of pieces in order the better to spring. Steinitz played all styles; and I am sure that if he had any preference, it was for open battle and with a grin to take it on the chin—and give! It should be remembered, too, how in his later period great herds of amiable analysts had trodden and nibbled the pastures bare. Steinitz simply trekked. (William Ewart Napier, *Paul Morphy and the Golden Age of Chess*)

He would play the opening so he would get a strong center, but one which was more defensive and impregnable. The closed center became his specialty. This kind of a center was more amenable to a systematic approach and allowed him to develop a slow but sure wing attack. He would develop enough to be able to both defend and attack, but not enough to engage in complications. He realized that, in closed positions, the quick development of pieces was

secondary to lasting positional considerations.

He did not attempt to win the game in the opening because he believed that, to win, an error must first be made by one's opponent. He was objective about his own positions. He was the first strong player to take action based on objective evaluation alone, without speculation or intuition.

He was a fighter. Unlike Morphy, who seemed psychologically detached from the game when he played, Steinitz was visibly involved and his games were full of creative originality.

He believed that, to win, you must have the advantage; that you cannot force a win if it is not there. He did not hold much faith in psychology at the board. He believed in playing the position and not the man.

He was interested in defense. He would go to great lengths to win a small, but permanent, positional edge. He was obsessed with the concept of refuting an unsound attack. He detested the idea of a win that was the result of an unsound tactic or attack.

He would provoke unsound and premature attacks by making unusual moves. The idea was to tempt opponents to overreach themselves by playing for a win in a position that did not justify it. "The art of defending against premature attacks rose to new heights in the games and writings of Wilhelm Steinitz, who was the first official World Champion" (James Eade, *The Chess Player's Bible*).

His style, in his day, was considered objectionable because he demonstrated that many of the daring and exciting ways that his contemporaries played were unsound (such as playing for a win from the start, attacking without an advantage, or making careless sacrifices). Even his wins were resented for this reason.

Steinitz spent his life searching for and formulating strict general principles. "Wilhelm Steinitz, one of the great world champions and perhaps the first scientific chess master sought patterns leading to winning chess

formations and demonstrated them again and again. (George Koltanowski & Milton Finkelstein, *Checkmate!*). Because of Steinitz, chess became a scientific game. “The greatest representative of the scientific tenancy in chess was Wilhelm Steinitz” (Richard Reti, *Modern Ideas in Chess*).

Steinitz is a true artist, a painstaking, careful, conscientious, and impartial annotator, whilst as a describer of play he is unrivalled. Willing, at all times, to render full justice to the skill, style, and play of others, he has been frequently heard to observe that the difference in force between the six leading chess-players is so slight, that the result of a contest between two of them would be always uncertain.” (Henry E. Bird, *Chess History and Reminiscences*)

The origins of modern chess strategy have its roots in his work. As the most prolific chess author of the nineteenth century, his published work was in the form of regular columns in magazines (*The Field*, and the *International Chess Magazine*) and his unfinished *Modern Chess Instructor*. “Throughout his life, Steinitz was a very strong advocate of the bishop pair, and few other masters were prepared to pay such a high price for it” (Richard Forester, *Kingpin*, Spring 2006).

Even though he was one year older than Paul Morphy was, he stylistically belonged to the next generation. He shaped the ideas of positional play. He was the founder of the “accumulation theory (that a game could be won, and should be won, by the accumulation of many small advantages).” He organized and classified pawn structure weaknesses (such as doubled pawns and isolated pawns) and showed that pawns, especially around the castled king, are the strongest on their original squares.

He taught that the king was a strong piece and could be useful as an aggressive piece in the middlegame. He explained the ideas behind outposts, weak squares, open files, and holes. He classified the openings and taught the

value of the queenside pawn majority. He taught that a lead in development should be converted to a permanent advantage. He held that attacks must be aimed at the weak points in the opponent's position.

He established the idea that a positional advantage was necessary before launching a successful attack. He was one of the early proponents of the bishop pair in open positions and taught the concept of the bad bishop and the superiority of the bishop over the knight. He was the first person to realize that a successful combination is only possible if the opponent has made a mistake. He proposed the idea of economy in defense. He pretty much established and elucidated the classical principles of positional play that are still valid today.

It was Wilhelm Steinitz who first developed a method for evaluating a position. He would first divide a position into elements, then compare the characteristic elements for white and black, and only after this form an opinion on the position, choose a plan, and begin searching for a specific move. (Aleksander Kostyev, *40 Lessons for the Club Player*)

He pointed out that many of the successful attacks of his predecessors and contemporaries were decisive because of poor defense. He believed that most players played without a plan that was based on sound principles.

Steinitz has been criticized unfairly more than almost any past great player. The idea that his principles eliminated the brilliancies in chess is nonsense. "Indeed the claim may be made that after Steinitz, everyone has become his disciple" (Anthony Saidy, *The Battle of Chess Ideas*).

A story goes that once, he was arrested as a spy! The moves of a correspondence game between him and Tchigorin were mistaken for being a code with which war secrets were being divulged. Another interesting story is that once Blackburne, after having been beaten by Steinitz quite a few times, threw him out of a window.

He continued to play chess into old age, and continued to play well.

Nevertheless, as he got older, he began to have some sporadic psychological problems. For example, he thought that he could talk on the telephone without using a physical instrument; he thought he could move the pieces on the board by emitting an electrical charge from his fingertips, and that he could play with, and give pawn odds, to God.

In contrast to Philidor, Steinitz possessed the playing strength to demonstrate the correctness of his teachings; and unlike Morphy he had the means of sharing his ideas with the chess world. Of these three founders of position play, therefore, Steinitz is far and away the most important. (Max Euwe, *The Development of Chess Style*)

### ***HARRY PILLSBURY (1872–1906)***

Harry Pillsbury, an American, was one of the best players in history. During the period 1896–1902, he was probably the best player in the world (including even, then World Champion, Emanuel Lasker). He had equal records against both World Champions of his day, Steinitz and Lasker (out of 13 and 14 games respectively). Alekhine said that Pillsbury was the greatest chess talent in the United States second only to Morphy. He was also the hidden player in the automaton “Ajeeb.” “His best five-year average, according to Elo, was 2630, making him one of the thirty greatest players of all time (this may be a bit conservative, since so many of his contemporaries seem underrated)” (Andrew Soltis & Ken Smith, *Pillsbury the Extraordinary*).

At 22, he played in the 1895 Hastings tournament in England. It was probably the strongest tournament in history to date. It was a round-robin with the top players of the day, including: Tchigorin, Lasker, Steinitz, Tarrasch, Teichmann, Schlechter, Blackburne, Janowski, Mason, Burn, Bird, Albin, Mieses, and eight other top masters of the day. Pills-bury won that tournament by the score of 16 ½ - 4 ½.



His style was like Morphy's with Steinitz's clarity... positional, but with exuberance. He had a great imagination. He chose simple opening plans (mostly in openings like the queen's Gambit and Ruy Lopez) that were aimed at a good middlegame (not for a quick victory). He was largely responsible for popularizing both of those openings.

He had an incredible tactical talent. He was a fighter. He would take risks to avoid draws, and he often declined draws that he should have agreed to. His attacks were simple, yet ingenious.

Pillsbury was a disciple of Steinitz but the latter's persistent seeking and plodding was foreign to Pillsbury's character. He adopted indeed the complete practical results of the Steinitz theories and the latter formed the groundwork of Pillsbury's technique. Pillsbury is most wonderful when he set himself out to exploit weaknesses in a hostile position. Then does his play on big lines assert itself; not content with storing up small advantages, he always finds the right methods for destroying his opponent's position root and branch. His games attained a height above the ordinary level and placed Pillsbury in the rank of the great masters. (Richard Reti, *Modern Ideas in Chess*)

He was a genius at blindfold play. He was the best blindfold player of his day and often played blindfold simultaneous exhibitions. Sometimes, he would play chess and draughts blindfolded and play a hand of whist at the same time. "With both Capablanca and Alekhine a passion for chess was ignited by blindfold simultaneous displays given by the legendary Pillsbury before their very eyes" (Garry Kasparov, *My Great Predecessors Part IV*).

Pillsbury died at the age of 33. Had he not died at such a young age, he could have been a strong contender for the world title.

## **SIEGBERT TARRASCH (1862–1934)**

Siegbert Tarrasch, of Germany, belongs on a short list of the strongest players never to be World Champion. He was a practicing doctor of medicine. He declined the opportunities to challenge Steinitz in 1892 and Lasker in 1904. He would have probably beaten Steinitz. He did play Lasker for the title in 1908, but by that time, he was not as strong as he was earlier. He lost that match by the score of 10 ½ - 7 ½.

Tarrasch's style was somewhere between that of Steinitz and the combinative players who opposed him. He was a cautious player who had no tendency towards combinations or sacrifices. Even so, he often played a sharp and intense game. As a superior opening theorist, he understood the value of rapid and economical development of his pieces. He followed the general teachings of Steinitz, but he placed more significance on piece mobility.

He liked to make a point of depriving his opponent of all good moves, and referred to his own methods as the 'stalemating style.' For a considerable time Tarrasch was the best technician in the world. He was extraordinarily successful also as a teacher, for he had the knack of popularizing the fundamentals of position play. (Max Euwe, *The Development of Chess Style*)

Chess books were scarce in Tarrasch's day. Tarrasch was the first great chess writer-educator... the best in his day (and possibly the best of all time). His writings were clear and simple. The Modern School of Steinitz and Zukertort was fine-tuned a bit by Tarrasch's teachings in the early 1890's and, from the turn of the twentieth century to the Hypermodern days, Tarrasch's school was generally considered the correct way to play chess. Tarrasch put some order to the dogma of that school. He formulated general principles and discovered the correct methods in which to play various types of positions.

Even though he was still playing, he freely gave away his precious secrets; he did not withhold or conceal any of his original ideas. He brought strong discipline and science, not only to his play, but also to his teaching. He was

strongly influenced by Steinitz, but he made his own contributions to the science. He added value to the school and undermined it a bit at the same time. His goal was to draw up a set of principles based on the Steinitzian model and to present a sensible system of correct play.

He stressed the importance of securing an advantage in space. This may be his biggest contribution to chess theory. He demonstrated that space conferred the advantage of a more mobile attack to the possessor. The advantage in space, other factors being equal, should be decisive. The cramped side cannot move as freely from sector to sector as the mobile side and is therefore at a disadvantage. One of his famous sayings was, “Cramped positions bear the germs of defeat.”

He treasured mobility above everything else. He stressed the dynamic mobility of pieces over the static positioning of pawns. He demonstrated in his games and taught in his writing that superior mobility was the secret to gaining the initiative. He showed how better mobility routinely leads to the right strategy and the best move. He would rather have had good mobility with a weakness, than a cramped position with no weaknesses.

He stood for ideas like developing knights to c3 and f3, occupying the center with pawns on e4 and d4 (the classical pawn center) and fortifying it, keeping bishops on their original diagonals (as opposed to the fianchetto), early castling (preferably kingside) and to play with a plan.

The foundations of modern chess were laid by Steinitz and Dr. Tarrasch... His (Tarrasch's) discoveries in this field have been of inestimable value. His efforts have refined chess technique to an amazing extent; the Hypermoderns have not refuted or superseded Tarrasch—they have merely purified his theories by removing some of their weaknesses and exaggerations. (Fred Reinfeld & Irving Chernev, *Chess Strategy and Tactics*)

**MIKHAIL TCHIGORIN (1850–1908)**

### *World Champion Challenger (1889, 1892)*

The first great Russian player and one of the greatest Russian chess players of all time was Mikhail Tchigorin (Chigorin). He was one of the best four or five players in the world from 1883–1898. He won the first three All-Russian tournaments (1899, 1900–01, and 1903). In Vienna, in 1903, he easily won the tournament that included Maróczy, Marshall and Pillsbury. He had a lot to do with the development of chess in Russia and was one of the great innovators in chess.

Two times, he was the challenger for the World Championship (held by Steinitz). In spite of not winning either time, he played an important role in chess history.

Tchigorin was a master of the attack. He prized gambit openings. He played gambit openings 25 times against the World Champion, Steinitz, in his matches with him. The score of those gambit games was 14 wins, 6 losses, and 5 draws in favor of Tchigorin. He continued to play (and added much theory to) the King's Gambit and the Evans Gambit during the period of their decline in popularity. He took the open game to its pinnacle of excellence. In fact, he played nothing but open games as white. As black, he went all-out for activity. In defense, he felt that counterplay was the most important idea.

He had an individual and creative style. He played unconventional moves that would not even occur to most strong players. Instead of studying a position (as most masters would do) to determine how it was like another position, he would think about how it was different from other positions. He preferred knights to bishops (exemplified by the Chigorin Defense to the Queen's Gambit). His openings and middlegames were profoundly related. He was also the best endgame player of his time.

He was an aggressive attacking player in the style of "the old school," but his attacks were not as superficial and his tactics were more accurate. He had a great combinational intuition and played many brilliant attacks on the king. He

thrived in sharp, complex positions. His games were rarely dull. Comparing him to the great attacking players of the previous generation, Nicolai Grekov said:

When he attacked, his plans were more profound, his tactics more precise. They were exceptionally resourceful—but he was more original. They had a knack for combination—but in him, this quality was raised to virtuosity. They played with gusto—he played with exaltation. And so it can rightfully be said of Tchigorin that he is the epitome of the Russian chess player! (Nicolai Grekov, *Soviet Chess*)

He played chess, not necessarily to win, but because he loved it. As a result, he often took risks. He would even lose to weaker players because he was trying out an idea. Although he was considered the originator of the Russian School, he did not consider himself to belong to any particular school.

In the many outstanding games of the founder of the Russian School, M.I. Tchigorin, there are certain new ideas showing an understanding much in advance of his time. For example in the famous game against Pillsbury (St. Petersburg, 1895), in which Tchigorin was black, we see running throughout the whole game an artistic idea distinct for its strategic novelty, which directly opposed the dogmatic and stereotyped thinking of Pillsbury (immediate seizure of the center). (Vasily Smyslov, *My Best Games of Chess*)

Tchigorin had a huge impact on the development of chess in Russia. He founded a chess club in St. Petersburg, formed the All-Russian Chess Association, lectured and performed exhibition tours in many cities in Russia, and wrote for several magazines and chess columns. He subsidized Russia's second chess magazine, *Shakhmantny Listok* (1876–1881) and he was the main support of two other chess magazines. He used positions that he composed to

demonstrate sacrifices in an early Russian chess magazine that he edited. These deeds, together with his newspaper and magazine articles, all helped to popularize chess in Russia.

His dynamic style was a key inspiration that led to the formation of the Russian and Soviet School, and he may be considered its founder. “We, the Soviet chess players, follow the artistic legacy of Tchigorin and respect the memory of this Russian coryphaeus of chess thought” (Vasily Smyslov, *My Best Games of Chess*).

He was one of the top opening researchers and innovators in history. In this, as in his play, he was an original. Rather than build on previous opening theory, he developed his own. He took many neglected and obsolete openings and resurrected them by breathing new life into them.

He was the first to classify many opening positions in which the position is not weakened by a loss of tempo in development if the loss is later compensated for by a greater advantage. He was the first to replace the idea of a mechanical approach to the center with the idea of putting pressure on the center with pieces and pawns; a concept further developed decades later by the Hypermoderns.

He emphasized creative attacking ideas rather than strict obedience to supposed scientific principles. He exposed the weaknesses of the Steinitz and Tarrasch assumptions and added new principles of his own in the areas of openings, strategy and tactics. All the while, he felt that dogma should not be strictly relied upon; that principles change with progress and that by strictly adhering to current doctrine, we hinder our ability to develop.

He was one of the greatest of Russian players, an artist of chess thought, and perhaps the first player in the world to treat the game as it deserves. He did a great deal for the development of chess in Russia and had a very powerful influence on world chess thought. He was many years in advance of his time, and his work will always be an inexhaustible source for the

development and perfection of chess ideas. (Mikhail Botvinnik, *One Hundred Selected Games*)

## ***EMANUEL LASKER (1868–1941)***

*World Champion (1894–1921)*

Emanuel Lasker, a Jewish man from Germany, beat Wilhelm Steinitz in 1894 to become the second official World Champion. He retained the title for 27 years (when he lost to Capablanca), the longest undisputed reign of any World Champion. During this period, he was nearly always the winner of the major tournaments (and over players such as Rubinstein, Alekhine, Pillsbury, Maróczy, Janowsky and Capablanca).

In one of the strongest tournaments in history, New York 1924 (at the age of 55), he was clear first (with a score of 16-4) over all of the best players in the world (including Alekhine, Reti, Bogolyubov and Capablanca). He defended his title against Marshall in 1907, Tarrasch in 1908, and Schlechter and Janowsky in 1910. A challenge was made by Capablanca in 1911 for a title match, but they could not agree on the terms. Few World Champions have had a record as strong as his.

He was a good storyteller with an excellent sense of humor. He was a likeable guy, a good sport and possibly the most profound chess thinker of all time. He was a philosopher, an intellect, a friend of Albert Einstein, and writer of many books (mostly on subjects other than chess). When they talked, Einstein (probably the most famous “C” player of all time), apparently, wanted to talk about chess, and Lasker preferred to discuss mathematics.

Lasker’s style was unusual, to say the least. His openings were not usually good. His middlegame play was good, but not spectacular. In contrast, he was a fighter, a great tactician, a magnificent defender (especially in passive positions), and had nearly faultless endgame play. “Lasker was one of the best

endgame players the chess world has ever seen” (Irving Chernev, *The Chess Companion*). In the great tournament, New York 1924, he created endgame theory (over-the-board) by drawing with a lone knight against a rook and pawn. “Someone once said of Lasker that he played 1 P-K4 with a view to the end game” (Irving Chernev, *the 1000 Best Short Games of Chess*).

His openings were so weak and careless (for a World Champion) that Bobby Fischer said he knew “nothing” about openings and considered him a “coffee-house” player. Others put it in a different perspective. For example, “Lasker is the only grandmaster who, even in the opening phase, can allow himself the luxury of making second-rate moves”—wrote Savielly Tartakower” (Mark Dvoretsky, *Dvoretsky’s Analytical Manual*).

His tactical strength was most obvious in complicated positions. His positional play was so far ahead of its time that many of his opponents did not understand what he was doing.

He was an imaginative fighter who often saved games from hopelessly lost positions. Many consider him the greatest street fighter of all time. He was not afraid to take risks to win. When coming from behind in a game, his steady nerves and ingenuity would often steer him from certain disaster to victory. In this respect, he may not have had an equal throughout chess history.

Lasker’s style is more difficult to define than that of any of the other champions, and this is in a way characteristic of him (as Einstein observed, he could not be pinned down). Two features stand out: one is his tactical superiority, and the other is his search for clarity and order. That tactical superiority should be unique to one champion might seem odd; one would expect all to have it. In Lasker’s case, however, it was raised to the level of a style, in that, unlike the others, he would not commit himself to any doctrinaire point of view. Steinitz was often more anxious to prove his theories than to win; Capablanca was out to simplify; Alekhine to attack. (Reuben Fine, *the Psychology of the Chess Player*).



He tried to get away from the familiar kinds of positions so his opponent would have to rely on their talent as opposed to their preparations. He tried to get his opponent into the kinds of position that they would feel uncomfortable in. He was good at doing this. He was called the greatest swindler of all time, and was even suspected of using hypnosis.

Lasker's chief forte was the complex struggle of the middlegame, and he added little to our knowledge of the openings, being content to trod the best paths, and to leave the blazing of new trails to some more adventurous spirits. (B.F. Winkelman, *Rubinstein's Chess Masterpieces*)

He was not necessarily looking for the most correct move in a position as much as the one that would give his opponent the most trouble. Richard Reti once said:

For him the essential element is this contest of the nerves; he uses the medium of the chess game to fight above all his opponent's psyche, and he knows how to bring about the nervous collapse, which otherwise occurs only after a mistake, even before a mistake has happened, and to make this the very cause of subsequent errors... He is not so much interested in making the objectively best moves as those most disagreeable to his opponent; he turns the game in a direction not suitable to the style of his opponent and on this unaccustomed roads leads him to the abyss, often by means of intentionally bad moves. (Richard Reti, *The Psychology of Chess*, William Hartston & Peter Wason)

He believed in the elasticity of the position. He was often accused of making inferior moves on purpose, to confuse his opponents. The truth is that, confident in his great defensive skills (he was one of the greatest defensive players of all time), he wanted to get his opponent into unfamiliar territory where he would be able to outwit him with his talent and abilities. He was

simply being pragmatic.

He was the game's great psychologist, who knew better than anyone how to make the pendulum of battle swing left, then right, never overstepping the bounds of safety himself, while imperceptibly goading his opponent over the edge. He would deliberately play second-rate moves, practically inviting his orthodox opponent to punish him. (David Bronstein, *Zurich International Chess Tournament 1953*)

Above everything, he was a practical player. The goal is to win, not to play correctly. "Lasker understood every kind of checkmate, and often used threats of mate as part of his psychological arsenal. After all, it takes time and energy to find the best defense to a mate threat, and this worried his opponents" (George Koltanowski & Milton Finkelstein, *Checkmate!*).

Lasker expanded and clarified the principles laid down by Steinitz. Steinitz had great ideas, but the actual formulation of those ideas was done by Lasker. He did it to honor the player that he had defeated for the title. He even credited Steinitz with some ideas that were, in fact, his own.

He continued to play strong chess late into his life. At the age of 67, he placed second (behind Botvinnik and Flohr) in the major tournament, Moscow 1935.

At a lecture at Columbia University, he was asked what odds the deity might have to give him when he goes to heaven. His answer was met by a burst of applause: "No more than a bishop" (George Koltanowski & Milton Finkelstein, *Checkmate!*).

Albert Einstein had this to say about his friend, in his foreword to Dr Jacques Hannak's book, *Emanuel Lasker: Chess Colossus*:

For me, this personality, notwithstanding his fundamentally optimistic attitude, had a tragic note. The enormous mental resilience, without

which no chess player can exist, was so much taken up by chess that he could never free his mind of this game, even when he was occupied by philosophical and humanitarian questions. (Albert Einstein, *Emanuel Lasker: Chess Colossus*, Dr Jacques Hannak)

## **FRANK MARSHALL (1877–1944)**

*World Champion Challenger (1907)*

Frank Marshall was one of the great post-Morphy American chess players. Following closely on the heels of another great American player, Harry Pillsbury, Marshall was considered a chess genius. Known for his ominous attacking style, he played in the manner of the golden age of the combination (the 19<sup>th</sup> century). “Marshall generally relied on an intuitive but often phenomenally accurate appraisal of even the most difficult positions. It is symptomatic of the profoundly mysterious character of chess that Marshall’s method proved effective so often” (Fred Reinfeld, *Hypermodern Chess*).

He won the great Cambridge Springs tournament in 1904, and finished in fourth place (behind three World Champions) in the super-strong tournament, New York 1924. Between those two events, he was ranked among the world’s best players. He lost a title challenge to Lasker, but he was the US Champion for 29 years (and retired undefeated). He had at least two gambits named after him (in the Ruy Lopez and Sicilian Defense).

He was an openings innovator, but he was not a “book” player. He believed that one should play the game by the seat of the pants rather than by preparation for a certain openings, variations or opponent. He would investigate rare openings and find ideas, which he would use, successfully, against strong players.

He preferred the open game. “Give Marshall a wide-open game, and he could beat anyone “like a child,” to use one of his own favorite expressions”

(Irving Chernev, *the 1000 Best Short Games of Chess*).

He had a spirited, arguably old-fashioned, style that was full of creative and lively tactics. “Marshall had as keen an eye for a mate in five as anyone that ever lived. I have seen him solve in a twinkling problems that baffled other masters” (Irving Chernev, *Capablanca’s Best Chess Endings*).

He understood positional play, and used the ideas as necessary, but he was for the most part a tactician with a sense of adventure. He was the most brilliant player of his generation, a master of the attack. As in the games of his golden age predecessors, his games were filled with beautiful sacrifices. “Although the American champion’s play was frequently erratic and not wholly sound, his games were marked by brilliant conceptions. A tactician par excellence, he was always fertile in ingenious ideas and sparkling combinations” (Fred Reinfeld & Irving Chernev, *Chess Strategy and Tactics*).

He had a reputation for the “swindle.” He had several famous swindles and even called himself a “swindler.” Yet the reality is that he had such great powers of concentration and tenacity and, because of this, he was able to save many a bad game.

Marshall himself was quoted in *New In Chess* (2007/3):

I am frequently asked... “What is your choice among openings, or among variations?” My answer is, “I have none.” I look upon chess as a contest of intellect and character over the open board. I believe a player should be prepared and ready for every emergency and should play no favorites.

Marshall, with the help of some friends, opened “Marshall’s Chess Divan” in 1915. This was the beginnings of New York’s famous Marshall Chess Club.

## **JOSÉ RAÚL CAPABLANCA (1888–1942)**

*World Champion (1921–1927)*

One of the true legends of chess was the Cuban born José Raúl Capablanca. He has been called “the greatest natural player that ever lived,” “the machine,” and “chess history’s greatest genius.” “Lasker and Capablanca. As a fighter, as a player, Lasker had the more subtle, intelligent, crafty style; but Capablanca had the greater talent” (Mikhail Botvinnik, *One Hundred Selected Games*).

He learned the game at four years of age, not by being taught, but by watching his father play. “It happened in the old Spanish fortress La Cabaña that stood near Morro Castle, overlooking the splendor of the entrance to the capital of Cuba” (Olga Capablanca, *Chessworld*, Volume 1, Number 3).

The story goes that one evening he deduced the moves, the object of the game, and even some of the subtleties of the game while observing his first game of chess (a game between General Loño, a cavalry general, and Capablanca’s father, a Spanish cavalry captain). The game was played at the palace of the Governor of Havana (Cuba was a colony of Spain at the time). After watching the game for some time, the boy warned his father that he was about to make a bad move. He was told to be quiet. Later, his father asked him what he was trying to tell him. The little boy said something about a knight’s move. The father asked the boy if he expected him to believe that he actually knew how to play the game. The young Capablanca then set up all the pieces in the correct position and said something to the effect of “you can have white.” They played, and Capablanca won his first game of chess.

By the time he was six years old he was playing some locally well-known strong players (even beating some of them when given some odds). Before he was eight years of age there was talk of him being unnatural, even having devils at his side. For the next few years, at the urging of the family doctor and priest, little José Raúl was not allowed to play chess. He resumed playing some time before he was eleven and, by then, no longer needed odds to defeat even the strongest players. By the time he was 12, he had flawless technique. When he was 13 years old he was the unofficial chess champion of Cuba (earning the

distinction by defeating Juan Corzo in an informal match in 1901 by the score of +4,-3,=6).

In 158 match and tournament games after 1914, he only lost four games. In the ten-year period 1914–1924, he only lost one game in tournament and match play. He played in 29 strong tournaments with 15 first-place and nine second-place finishes. In match, team, and tournament play from 1909 to 1939 he scored +318, =249, -34. He played 42 exhibition games without a loss (with only four draws) and 32 consultation games without a loss (and nine draws). He only lost 38 games in his whole life. That amounts to only 6% of his games. Compare that to the players with the nearest records: Alekhine 10%, Lasker 11% and Morphy 12%. He was never checkmated in his entire tournament career.

He beat Lasker easily (without losing a single game) in 1921 for the World Championship to become the third official titleholder in history. In 1922, after not having played a game of chess for 14 months, he played a simultaneous exhibition against 103 opponents (which included the champion of the state of Ohio and several other strong players). The simul lasted for seven hours and ended with Capa winning every game except one, which he drew.

“His rapidity of play is combined with a depth and correctness that is almost marvelous... he seizes opportunities and grasps positional advantage with a rapidity born of intuition that marks the genius”—*New Orleans Times-Democrat*. At the end of a display, “Capablanca went round so rapidly that part of the time black found it impossible to write down the moves”—*Philadelphia Ledger*. Black need not have bothered: after a display Capablanca could remember all the moves of every game. (David Hooper & Dale Brandreth, *The Unknown Capablanca*)

Capablanca was certainly one of the most talented chess players in history. He had a way of making the complex seem simple. He could even be

described as “lazy” when it came to studying. A handsome playboy, he would rather spend a night on the town than study chess. He rarely studied chess and, instead, pretty much lived a celebrity lifestyle.

Capablanca’s style was, in many ways, much like Morphy’s, and they both started playing strong chess at a young age. Another notable similarity is the ease with which they seemed to make decisions, even in complex positions. “The simplicity of Capablanca’s play and his ability to soar when occasion serves bear marked similarity to Morphy’s suavity in evolving attacks” (William Ewart Napier, *Paul Morphy and the Golden Age of Chess*).

Capablanca was a genius, the greatest ever produced by chess. He handled every phase of the game with equal facility... His technique was flawless, and his style so graceful and elegant as to make chess look easy. No player in all the world’s history has equaled in artistry, logic, and crystalline clarity the masterpieces produced by Capablanca. (Irving Chernev, *Twelve Great Chess Players and Their Best Games*)

His style seemed effortless and his play was notable for its astonishing accuracy. His play was direct and classical. He would bring complications under control and steer the game into a clear position that favored him. His intuition was better than the level of technical skills of his opponents. He was known for the speed and accuracy of his deep penetration into any position, no matter how complicated.

Of his rapid judgment, many tales are told. Botvinnik recalled that he and Ragozin, after ‘thorough analysis’ of a position, consulted Capablanca who listened, smiled, shook his head, and immediately pinpointed their errors: ‘We went into a long analysis and it turned out that Capablanca was right.’” (David Hooper & Kenneth Whyld, *The Oxford Companion to Chess*).

He could tell at a glance how to handle the pawn structure of a position,

which pieces to exchange, and what squares to control. Rueben Fine once said, “What others could not see in a month’s study, he saw at a glance” (*Capablanca’s Best Chess Endings*, Irving Chernev). He hardly ever made serious mistakes. He was a consummate tactician, (though he never went through the Romantic wild attacking stage, even as a youngster).

He was an excellent and instinctive positional player. One of his favorite techniques was to destroy his opponent’s coordination of his pieces by cutting them off from the action. “Of Capablanca’s own games it has been written, with justice, that they breathe a serenity, a lucid crystal clarity, a type of model perfection. Indeed, that they are the product of supreme chessboard art” (Raymond Keene, *Keene on Chess*).

In the endgame, he had no equal in his day, and he is considered one of the best endgame players of all time. He knew thousands of endgame positions by memory. He could exploit and capitalize on even the slightest weakness. He never initiated sharp tactical positions with chances for both sides. His style was to have the game under his control, simplify, and avoid unclear or wild positions and not to take risks.

He never bluffed, or played intuitive pawn sacrifices. His sense of safety prevented it. As a result, he lost very few games. He was materialistic (in the sense that he would often win a pawn and nurse it to victory with his superior technique), but he did not set out to win materially (he saw the game as a whole and did whatever was necessary). Capablanca’s games were decades ahead of their time.

He is credited with the discovery of the minority attack. He was also a strong defensive player.

When one refers to defense in the game of chess, then one must not forget one name, and that is, Capablanca... But Capablanca’s strength as a defensive player has not been appreciated to the full... In clear positions, where he had the disadvantage, particularly in the end game, Capablanca



defended himself with remarkable coolness and astonishing powers of resource... There existed very few masters indeed skilful enough to utilize a small endgame advantage against Capablanca, who understood as no person how to avail himself of the smallest possible chance. (Paul Keres & Alexander Kotov, *The Art of the Middle Game*)

His only weakness was the openings. He did not have the patience or the interest in studying openings, yet there are several opening variations named after him. As Anatoly Karpov put it:

Previously, leading figures such as Lasker, and in particular, Capablanca, were chess “lazybones” (I have serious theoretical work at home in mind). They did almost no study of the openings. They were so ingenious (and they knew it) that they could manage things at the board without any trouble. They demonstrated this in practice. The most vivid example of this is when Capablanca had to face the brilliant and inventive Marshall’s counterattack in the Ruy Lopez over the board, an encounter in which he was able to analyze in detail and make moves which even today are not considered to be weak. (Anatoly Karpov, *Anatoly Karpov’s Games as World Champion 1975–77*, Kevin O’Connell & David Levy)

Another criticism of his play is that, if he had taken more risks, he could have avoided many of the dull draws that he had with inferior players. Of course, he would have not have remained undefeated as long either. He had a policy of always “keeping the draw in hand.”

He was aware of his talents and he would react when confronted. Once, the Russian master, teacher, and author Alexandrovich Znosko-Borovsky, wrote a booklet entitled *Capablanca’s Mistakes*. Capablanca remarked that he had planned to write a book called *Znosko-Borovsky’s Good Moves*, but gave up due to the lack of material.

Another example of his defensiveness is provided by another quote from Capa himself:

During the course of the tournament (San Sebastian, 1911)... Nimzovich, who considered himself very superior to me and others in the tournament, became very arrogant during the course of one of his lightning games against Bernstein, saying, because of a remark that I made, that I should not interfere in their game, as they were reputed masters and I had yet to become one. The outcome of his discourteous remark was a series of quick games for a side bet, which I won with ridiculous ease, and ended by his retracting the statement he had previously made. Many more of these games were played, until all the masters agreed that I had no equal at this kind of chess. (José Capablanca, *My Chess Career*)

Capa was quoted as saying: “I know more about chess than any living person.” “I could play 30 of the best players in the United States at one time and not lose a game” (Howard Dolde, *Correspondence Chess News*, #86, [Correspondencechess.com](http://Correspondencechess.com)).

It is good that he rarely lost. “He was a notoriously poor loser. When he lost to Marshall at Havana in 1913 he had the mayor of the city clear the room of all spectators before he would admit defeat” (Reuben Fine, *the Psychology of the Chess Player*).

It was not long after he won the World Championship, though, that Capablanca became bored with chess. Outside of tournaments, he hardly played at all. He began to think that the game of chess was all played out and that he had conquered the game. He suggested that the board be expanded and new pieces added to make it interesting again. He thought that there was nothing more to learn about the game.

He did not defend his title until 1927, because the two likely challengers

(Rubinstein and Nimzovich) could not raise the stake money. In 1927, he lost his first defense of the title to Alexander Alekhine. One of the reasons for his loss was his refusal to study openings, a fact that Alekhine capitalized on by putting an emphasis on the openings. In addition, Alekhine outplayed him in the endgame. Alekhine played more concretely whereas Capablanca played more based on generalities (another bit of laziness).

Alekhine later said that he did not believe he was superior to Capablanca at the time, but that Capa lost because he over-estimated his ability and, at the same time, underestimated Alekhine's ability. After losing the title, the two of them could never come to an agreement about the terms for a rematch.

“Lasker said, ‘I have known many chess players, but only one chess genius—Capablanca’” (Cecil Purdy, *Extreme Chess*).

## **ALEXANDER ALEKHINE (1892–1946)**

*World Champion (1927–1935, 1937–1946)*

Considered by many to be the best chess player of all time, Alexander Alekhine was born in Moscow into a wealthy and noble family. He was taught chess by his mother. He studied for a law career, but gave it up for chess.

“Dr. Alexander Alekhine (1892–1946) was the greatest player in the history of chess. That is my opinion” (Fred Reinfeld, *Chess Masters on Winning Chess*). In contrast to Lasker and Capablanca, he played almost constantly (in major and minor tournaments and giving exhibitions).

Alekhine won or shared first place in eight out of the fifteen strong tournaments that he played in from 1921 to 1927. He played in ten tournaments from 1929 to 1933 and won every one of them (in two of them, he was tied for 1<sup>st</sup>). Out of 108 games, he only lost three. Since becoming a master, in 1909, Alekhine played in 44 strong tournaments. He won, or tied for first in 29 of them and placed second, or tied for it, eight times. In other words, in 37 of

44 strong tournaments, he placed first or second. Of 39 minor tournaments, he took first place in 34 of them.

He won more first prizes in international tournaments than any other player in history, was World Champion for 18 years, improved the art of analysis, contributed a great deal to chess theory, wrote 18 chess books, was one of the best annotators of all time, and was one of the most remarkable blindfold players in history.

In 1930, he won the very strong San Remo tournament with the score of 14/15. In 1931, he won the also very strong Bled tournament with a score of 20/26. He won those master tournaments ahead of second place by four and five points, respectively.

Between 1927 and 1936 his successes in tournaments were unequalled by any master at any time in the history of chess. In particular at San Remo 1930 and Bled 1931, though many of the greatest masters of the day took part, he left the field so far behind that he was at that time indisputably in a class by himself. (Julius Du Mont, *My Best Games of Chess, 1924-1937*, Alexander Alekhine)

Dr. Alexander Alekhine was the first two-time World Champion. First, he defeated Capablanca for the title and then, after losing it to Max Euwe in 1935, beat Euwe in a rematch in 1937 to regain the title. He defended his first title twice against Bogolyubov, but because of problems with who should be the challenger and because of World War Two, he did not defend it again before he became the first World Champion to die holding the title (in 1946).

Until 1937 the world champions who had lost their proud titles had not been able to muster enough strength to regain them. Deserved respect is due Alekhine because it was he who was able to provide the exception to this rule. (David Bronstein, *Soviet Chess*, Nicolai Grekov)

Alekhine was a heavy drinker for most of his life. His drinking got worse after he won the World Championship the first time. Then, when he played Euwe for the title in 1935, most witnesses say he was even drunk during the actual games. To his credit, he was able to subdue the drinking for his rematch in 1937..., which he won relatively easily.

He was the first champion to be completely devoted to studying chess. He studied or played chess about eight hours a day. Alekhine was the first top-caliber player that was serious about opening preparations. He was an authority on them and played almost every opening. He tried to get an advantageous position out of each opening. He knew how to infuse some aggressiveness in his opening moves so they would ultimately provide the conditions for an attack. He either won, or achieved a decisive advantage, in a relatively high percentage of games in the first dozen moves or so. As black, he would try to develop an active counterplay and a counterattack instead of equalizing (although he did not always succeed with this against the top players).

As to his style of play, it was that of the true artist; it was art for art's sake. The inventing of a method, the playing according to principles, were not for him. His play was neither classical nor hyper-modern. It combined the best of all known styles in one harmonious whole; technique was to him a means to an end. He was truly a great artist. (Julius Du Mont, *My Best Games of Chess, 1924–1937, Alexander Alekhine*)

He is probably best remembered for his brilliant attacking style. He was the master of the attack, and most notably, of the surprise attack. He was not so much trying to play the perfect game as he was trying find the right time to destroy his opponent tactically, even in positions where the prerequisites were absent (for example, the 14<sup>th</sup> game of his rematch with Euwe). He has been called “the greatest attacking player of all time.” In fact, he thought of himself

as the best attacking player in history, as well. It did not matter to him how strong his opponent was, amateur or world-class; he usually won brilliantly.

He was one of the great tactical geniuses of all time and a middlegame virtuoso. He had an incredible, rare and clear combinative vision. The depth and beauty of his combinations were amazing.

The games of Alekhine were and are felt by many to be exciting and inspiring. His thinking in chess was directed towards the concrete; in this area he was very creative. Therefore his games are full of combinations, and the observer is entertained with an abundance of changing pictures. His concrete thinking and his deep calculations were also brought out to advantage in the endgame. As a weakness, an exaggerated straightforwardness occasionally appears, making him rattle off spectacular combinational lines, looking neither left nor right for alternatives and less obvious improvements. (Robert Hübner, *World Champion Alekhine*, CD)

Like a magician using the art of misdirection, an Alekhine combination was often initiated after a series of harmless-looking moves that would throw the opponent off balance. One of the most characteristic features about his style was his ability to find unexpected and dazzling combinations in the most normal-looking positions.

Alekhine is the most brilliant, the most imaginative player in chess history... Alekhine's games can be described in one word—wonderful! They form a collection of master-pieces imbued with artistry, originality, imagination, and brilliance. In the field of combination play, Alekhine is unsurpassed. His creations, rich in color and variety, are always of absorbing interest. At his best, and that was often, Alekhine astounded the world with a wealth of inspired combinations dazzling in their beauty and

splendor. Alekhine's fiery play has always inspired raves, such as these: "At his best, Alekhine may have had equals, but he did not have any superiors," says Reuben Fine, "For sheer originality, profundity, and technical perfection he was never surpassed. He ranks among the really great artists of the chess board." (Irving Chernev, *Twelve Great Chess Players and Their Best Games*)

He would deliberately, and subtly, play into his opponents' strengths and then tempt them to go beyond their abilities, or deliberately play inferior moves to create extreme complications. Yet, Alekhine was in control all the while (he could see much further ahead than anyone else).

He would adjust his own style to cause the most trouble for his opponent. He might force you into a game that did not suit you, or go into your kind of game, giving you just enough rope to hang yourself. For example, against Capablanca, a master positional player, he played a tedious positional struggle and, through patience and tenacity, he out-worked his opponent. Against Bogolyubov, he steered the game into positions in which his opponent was tempted to go in for wild tactics. Then Alekhine's superior tactical ability would overcome his opponent's attempts. Alekhine might meet a known theorist head-on with a rare or obsolete variation. If he was playing someone who was weak on opening theory, he might dazzle him with deep theoretical lines.

His combinative strength was beyond anything seen since Anderssen. He wanted not only success out of a game but beauty. He could turn a dull position into a stunning work of art. He left us with many beautiful games.

I can comprehend Alekhine's combinations well enough; but where he gets his attacking chances from and how he infuses such life into the very opening—that is beyond me. Give me the positions he obtains and I would seldom falter. (Rudolf Spielmann, *Alexander Alekhine's Chess Games, 1902–*

1946, Leonard Skinner & Robert Verhoeven)

As time went on, Alekhine improved his positional play in order to contend with the top players of his time. His sacrifices began to take the role of capping off a strong positional build up. His main aim was first to create an advantageous position, then sacrifices and tactics could complete the job.

He was a master of all aspects of the game. His comprehension of the game was much more profound than any previous player's comprehension. He seemed to have all of the styles at his disposal. He had exceptional positional understanding, but he was also a master of the dynamic style of play. He could find and exploit the nuances in a dynamic position. Because he brought back the accent on dynamic chess, he can be called the founder of the modern style of chess.

His style was more complicated than most other players' style. He had incredible powers of imagination. His plans were grandiose, and full of extraordinary and original ideas. He was not afraid to take risks. He was willing to gamble a little to avoid the risk of drawing.

He believed that a psychological approach to the game was valuable. He thought a player should prepare for an opponent by studying his games to discover all of his strengths and weaknesses, and then to prepare a way to force him into positions that he did not like. He played psychologically and knew how essential it was to force added emotional stress on his opponent.

Chess was everything to Alekhine... he loved the game. He carried a pocket chess set with him all the time and would analyze every chance he got (on a train, in a cafe, at a concert, walking down the street... anywhere). He would play speed games when he was not competing or analyzing.

He was a good sport and generous with his time with other players. He would happily go over the game in a post-mortem with weaker players, explaining the ideas and freely giving advice. He was a gracious loser, as well. When he lost the title to Euwe, he held out his hand and said, "Hurrah to the



new World Champion!”

He had a great talent for blindfold play. At one time, he did a blindfold exhibition against a field of 32 strong players. In his book, *My Great Predecessors Part IV*, Garry Kasparov recounted a story about Alekhine and Miguel Najdorf, as told by Najdorf’s daughter:

In 1932 he (Najdorf) drew two exhibition games with Alexander Alekhine, who had arrived on tour. In her book, Najdorf’s daughter Liliana gives a dialogue between her father and the fourth world champion, which took place in Buenos Aires in 1939. Najdorf: “Doctor, you and I played three games, and the score was 2-1 in my favor.” Alekhine (indignantly): “That’s not true, there were two games, and they ended in draws, both of which you barely saved!” Najdorf: “No doctor, we met three times. In 1929 in Poland you gave a simultaneous display on 30 boards plus another two playing blindfold. I was one of those two.” Alekhine: “A Thirty plus two blindfold... So it was you who sacrificed a rook on e7?! Yes, that means you’re right!” (Garry Kasparov, *My Great Predecessors Part IV*)

He had thoroughly studied the works of Steinitz and Lasker. By the early 1930’s he had become discontented with classical ideas. His games, at this time, started to take on a more complex and risky character. He would make positional sacrifices of a pawn for better activity, and ignore certain positional weaknesses. In general, he displayed a more dynamic approach to the game.

While not a prolific writer, Alekhine’s annotations are among the best in chess literature. In Alekhine’s two-volume book, *My Best Games of Chess 1908–1937*, translated by J. Du Mont and M. E. Goldstein, Du Mont had this to say about Alekhine’s writing:

Alekhine contributed few works to the literature of chess. Three important books are available in the English language: The New York

tournament and two volumes of his own games. The value of all three lies in the annotation. For objectivity, clarity and clear-cut finality, they stand alone. The reason why he wrote so little is that he would not have been interested in writing for the average player, even if he could, and the writing of “pot-boilers,” no matter how remunerative, was foreign to his nature. (J. Du Mont, *My Best Games of Chess 1908–1937*, Alexander Alekhine)

He advanced the concept of active counterattack in the opening. He was responsible for many new opening systems and variations. He initiated two new and especially significant principles of strategy in the opening (“the illegitimate disruption of balance” and “the concrete tactical opening”).

He was a Hypermodern, but he was also a forerunner of the Dynamic School. The old concept was to try to find the best move in each position and to accumulate advantages. Alekhine, though, looked for the dynamic solution to the game as a whole. As time went on, he came to be looked upon as one of the early pioneers of the Soviet School. He carried Tchigorin’s torch and passed it on to Botvinnik.

Alekhine holds the unenviable distinction of being the only World Chess Champion to die while holding the title. After he died, the Soviet Union honored him as the greatest star of Russian chess.

“When asked in many interviews whom Fischer considered the greatest masters in the history of chess, Fischer answered without hesitation: ‘Alekhine and Fischer.’” (Eduard Gufeld, *Bobby Fischer from chess genius to legend*).

## **MAX EUWE (1901–1981)**

*World Champion (1935–1937+ one day in 1947)*

Max Euwe, a Dutchman, won the national championship in 1921 (and many times subsequently). He became the fifth World Champion by beating

Alekhine in their title match in 1935. He was a mathematician, teacher, athlete (he was a boxing champion), and an author. Euwe was not even a professional chess player. He had many interests, not to mention an occupation (he was a Professor of Mathematics), outside of chess. He is the only amateur (non-professional) chess player to become World Champion. He not only won the World Championship in 1935, but he had previously won the second (and last) World Amateur Championship in 1928.

It is sometimes thought that Euwe's winning the championship was a fluke, and that he was not that strong (probably because of Alekhine's drinking in their first match, and how easily Euwe was beaten in their second match). Nothing could be further from the truth. He was a strong player and, had he been able to devote the time to chess that his contemporaries were devoting, there is no telling how far he could have gone.

He competed in four big tournaments during his two years as World Champion. He placed first in two of the tournaments, and placed second and third in the others (over Alekhine and other great players of the day). His record against Alekhine in those same two years was two wins and a draw. Thus, it did not appear to be a stroke of luck that he was the World Champion.

His games were based on sound logic, solid preparation and were founded on a plan. He has been called "a genius of law and order."

As an openings authority with encyclopedic knowledge, he developed improvements to several opening variations. He was rarely outplayed in the opening. An exception was in the case of an opening novelty, in which case he was capable of being psychologically derailed.

He was not an aggressive attacking player, but he was comfortable in complex tactical situations. His talent was mostly tactical; he rarely played an unsound tactical combination. Yet he subordinated his tactics to the overall strategy of the game. He relied heavily on general principles.

Alekhine himself said: "Does the general public, do even our friends, the

critics, realize that Euwe virtually never made an unsound combination? He may, of course, occasionally fail to take account of an opponent's combination, but when he has the initiative in a tactical operation his calculation is impeccable." (Dr. Steven Dowd, *Chess Life*, April 2007)

In 1931, he became an International Arbiter. During the years after losing his crown back to Alekhine, he continued to play at the highest levels. In 1946, he placed second at Groningen (behind Botvinnik and ahead of Smyslov, Najdorf, Szabo, Flohr and Boleslavsky).

After Alekhine died (while still holding the title), in 1947, FIDE appointed Euwe as World Champion. The Soviets, though, were successful in getting that decision overturned the next day. Consequently, for one day in 1947, Euwe was the World Champion again.

He was a thoroughly nice guy and a hard worker. It has been said that work was his entertainment. Euwe continued to lead an active life apart from chess, and this ultimately prevented him from being competitive at the highest levels. He did go on to become the president of FIDE (1970–1978). During his tenure, he was the supreme arbiter of the 1972 Fischer-Spassky match in Reykjavik, Iceland in 1972.

## ***MIKHAIL BOTVINNIK (1911–1995)***

*World Champion (1948–57, 1958–1960, 1961–1963)*

At the age of 12, Mikhail Botvinnik defeated Capablanca in a simultaneous exhibition. At the age of 16 (while claiming to be older), he qualified for inclusion in the USSR Championship. He became the champion of the Soviet Union seven times. In 1941, he won the match/tournament for the absolute championship of the U.S.S.R by winning every match. He won the International tournament, Groningen, 1946. Moreover, he was a three-time World Champion

during a fifteen-year span.

Without a doubt, the strongest player in the world in the middle of the twentieth century, Botvinnik had total mastery of all phases of the game. Like Euwe, he had a separate full-time career (he was an electrical engineer). He was considered the strongest player in the world in the 1940's, but, because of the war, a match with Alekhine was never to be. As a result, he became the first World Champion to win the title by a qualifying tournament rather than from a match with the reigning Champion.

He had plus scores against the World Champions Lasker, Alekhine, Smyslov and Spassky, as well as the majority of the top players in the world at the time.

Interestingly, he never won a match as the World Champion. As the champion, he tied two title matches (Bronstein and Smyslov) and lost two title matches (Smyslov and Tal), winning the rematches in both cases.

His style was a combination of great energy, knowledge, psychology, patience, imagination and ability in all phases of the game. He had a deep "book" knowledge and, at the same time, a great imagination which he employed to derive some creative and brilliant ideas.

Botvinnik was an accomplished opening theoretician (which was one of his best strengths). His openings knowledge was immense. He played only a few openings, but he knew them well. To this, he added profound theoretical innovations by devising and playing his own original variations.

His games displayed deep strategical concepts based on exceptional logic. He had a scientific approach to the game and a high capacity for work and study. He was a fighter with a strong will to win. He could penetrate deep into a position for understanding.

He was a tactical genius, able to conceive of and evaluate long variations. He could merge the tactics with his strategies, one aiding the other. He was always after the initiative.

He excelled at, and sought, complicated positions that abounded with

tactical play. His middlegames were often complicated. His patience and nerves served him well in these kinds of positions, as well as in long positional struggles.

His attacking prowess was enormous. His attacks would often include brilliant combinations with unexpected sacrifices. Some of his sacrifices are legendary. He could also attack by applying an increasing positional pressure that would eventually overpower his opponent.

He was also an excellent defender. He could find hidden resources in difficult positions. He could defend by creating insurmountable positional problems for his opponent or by a tactical counterattack.

He was a consummate endgame player with great technique. He was famous for his well-organized training methods, including the study and systemization of endgames.

He was enthusiastic about studying his opponent's styles. As an excellent positional player, he was able to steer the game into positions that were unfavorable to them. He paid attention to the psychological aspects of the game, in terms of playing against the opponent's weaknesses and dislikes, but he principally believed in playing the board. To him, the game was not against a person, but was a problem to be solved logically and objectively.

If he had a weakness, it was his play in dull positions. In a dry and tedious position, he could become vulnerable. This is what happened to him in the 1963 match with Petrosian (which cost him the title).

In an article by grandmaster Levenfish, devoted to an appreciation of my creative play, he adduced the fact that I avoid quiet positions as a defect of my game. Well, I have to admit that I do avoid such positions. Moreover, I think this is perfectly logical, and inherent in the style of Soviet players, just as it was in Tchigorin's and Alekhine's style. Naturally, on occasions when passive defense is the only right way, Soviet players do not avoid such systems. But in our preparation for the game, in setting ourselves

definite creative objectives, in our creation of works of art at the board, we think first and foremost of the initiative, the attack, the counter-attack, and not of passive defense. (Mikhail Botvinnik, *Botvinnik: One Hundred Selected Games*)

Like Steinitz and Tarrasch, he was organized and scientific in his approach to chess. He did his own research and developed a creative new approach to the game. He studied the opening, the middlegame and the endgame systematically. He developed several new technical methods. He had great analytical abilities and the talent for expressing complex ideas in simple language. He was a pioneer of computer chess research and a researcher in the algorithm of chess thinking. He developed training methods that cultivated the Soviet method and he ultimately had students such as Karpov and Kasparov.

Here I should like to express my word of gratitude to Professor Botvinnik. Because he was not simply the World Champion, i.e., the strongest practical player. He showed the road which is now followed by all the leading grandmasters. This road is the study of chess, the maximum correlation of the game with science, and the entire chess world is deeply grateful to Botvinnik for this. (Yefim Geller, *The Application of Chess Theory*)

Building on the Soviet School fundamentals (such as hard work, preparation, and a fighting spirit) advanced by Tchigorin and Alekhine, he added the scientific method. He developed or refined many positional ideas. For example, he reassessed the disadvantages of doubled pawns and found some advantages to them. He introduced the idea that the opening is organically linked to the middlegame. He contributed to the improvement of the methods for handling isolated queen pawns. He was the first top player to demonstrate the advantages of a correct exchange sacrifice.

He created a training curriculum that was unparalleled for its

thoroughness. It consisted of practice with top-caliber players, the circulation of analysis to be reviewed by others, the studying of master games, the learning of time management and practicing concentration with significant distraction. “We all consider ourselves pupils of M.M. Botvinnik, the acknowledged leader of Soviet chess players. Future generations, too, will learn from his games” (Tigran Petrosian, *Botvinnik’s Best Games 1947–1970*).

## **VASILY SMYSLOV (1921–)**

*World Champion (1957–1958)*

Vasily Smyslov, the seventh World Champion, was the second consecutive Soviet player to hold the title (with three more to follow). He gives credit to his father for instilling the basic skills in him. Born in Moscow, he learned to play at the age of six. He was able to study chess conveniently at home because his father was a strong player who had a substantial chess library. His father taught him to appreciate and understand the fundamentals by training with only a few pieces at a time. This way, Smyslov said he was able to gain a sense for the individual peculiarities of the pieces and their relative strengths in various positions. It also helped him to develop of a sense of the harmony between pieces.

In Leningrad in 1941, Smyslov placed third in a tournament of the strongest chess players in the Soviet Union. This earned him the title of grandmaster (which made him the youngest grandmaster in the world at that time).

One of his greatest achievements was winning the great Zurich 1953 candidates tournament (about category 16) two points ahead of his closest rival. One of the top tournaments in history, the players also included Bronstein, Keres, Reshevsky, Petrosian, Geller, Najdorf, Kotov, Taimanov, Averbakh, Boleslavsky, Szabo, Gligorić, Euwe, and Stahlberg. He played in nine



Olympiads with a total score of 69 wins, 42 draws and only 2 losses.

In his three world-title matches with Mikhail Botvinnik (1954, 1957, and 1958), Smyslov and Botvinnik played 69 games. The results of those 69 games were 18 wins, 17 losses and 34 draws, in favor of Smyslov. In 1983 (at the age of 62), he again reached the Candidates final. He would have played yet a fourth World Championship match if it were not for a defeat at the hands of Garry Kasparov.

Some characteristics of his style are harmony, serenity, clarity, precision, originality, tenacity, logic, and balance. “Smyslov brings a wonderful light touch to the game. His play is fluid and smooth, and his sterling qualities include a tremendous grasp of the ending” (Yasser Seirawan, *Winning Chess Brilliances*).

The art of chess interests V. Smyslov most of all from the point of view of all the unsolved problems inherent in it. The genius of Smyslov is experimental; he is an innovator, a stranger to the stereotype. Technical solutions and variations found in his play are not ends in themselves but a means of creating, a way of artistically instrumenting his ideas. (Peter Romanovsky, *My Best Games of Chess: Smyslov*)

He is perhaps best known as one of the top endgame theoreticians of all time. Whenever his position was worse, he would invariably trade queens and steer for the endgame (where he reigned supreme). “Smyslov almost always tries to exchange queens, if it does not worsen his position” (Mikhail Botvinnik, *Botvinnik-Smyslov*).

There is one department of the game in which Smyslov surpasses his rivals, and that is the endgame. There he is entitled to the privilege of being considered the greatest endgame artist of the day—one whose play may be mentioned in the same breath with that of Capablanca or

Rubinstein. (Irving Chernev, *Twelve Great Chess Players and Their Best Games*)

He was an endgame virtuoso on the level of Capablanca. He has passed on a great endgame legacy in his games and his books. Even in the endgame (where his technique was so powerful as to render most of his choices more or less mechanical), he would, given the chance, beautify the game with an imaginative move. He has a love of chess and the beauty within it. He will produce a work of art as long as it does not obscure his main objective: to win, and to do so efficiently.

“His great rival, Mikhail Botvinnik, once said that while Smyslov’s talent was universal, in the endgame ‘he was in his element. Sometimes he took decisions that were staggering their depth’” (Dennis Monokroussos, [Chessbase.com](http://Chessbase.com)). “In several of the games of my 1957 World Championship match against Botvinnik it was only in a difficult endgame that the issue was decided” (Vasily Smyslov, *Learn Chess from the World Champions*, David Levy).

He had a great attacking skill. When he obtained an advantage, he would often convert it to an attack, even in the endgame. After he developed a plan of attack, he carried it through with great resolve. His attacks were focused, unrelenting, consistent and efficient.

One of his great strengths was defense. In defense, he was exceptionally tenacious and resourceful. “His daring conceptions and profoundly original plans show the touch of the great Tchigorin. Characteristic, too, is the unusual tenacity which permits him to save many a poor game from the very best opponents” (Nicolai Grekov, *Soviet Chess*).

Smyslov was an outstanding and original openings theoretician. He is credited with many new opening ideas and systems. He has contributed ideas to the Ruy Lopez, Carokann, Nimzo-Indian, French, and Grunfeld Defenses. His opening play is as precise as was Capablanca’s, yet more modern. A blend of his openings strength, middlegame brilliance and endgame virtuosity is a recipe that is hard to beat.

His dynamic play and the pursuit of the initiative are both consistent with the Soviet School.

His style, though just as typically Russian, contrasts strongly with that of Botvinnik. Smyslov builds his game mainly on a positional basis—though this is by no means to say that he fights shy of combination. The general aspect of his style is pacific but the methods he uses to attain his goal are not always what they seem. His is less direct but stealthy, and all the more dangerous for that. (Max Euwe, *The Development of Chess Style*)

He is an accomplished tactician. He has a flair for creating combinations even from apparently passive positions.

He is a brilliant tactician, and has produced many fine specimens of sparkling middlegame combinations and slashing K-side attacks. As Bronstein once said, “The title of positional player does not mean that a grandmaster is not gifted with amazing combinative vision.” (Irving Chernev, *Twelve Great Chess Players and Their Best Games*)

Smyslov has several “main” strengths. Another one of them is his positional knowledge. He has a great depth of strategical ideas, a thorough understanding of positional play, and a great chess intuition.

He was not a fan of draws. In positions where there are equal chances for both sides, he will try to increase the tension and try to pose as many complex problems as he can for his opponent. Still, he was not sidetracked from his goal of winning by the lure of brilliancy. If it was possible to win creatively and beautifully, he would. Otherwise, he would play for the win, regardless of the beauty of the method.

He was also a teacher. Smyslov was awarded the order of Lenin (which was the highest honor at the time in the Soviet Union) for teaching chess to kids and for his work in promoting chess in general.

On March 19, 1976, I (the author) had the great pleasure of meeting Vasily Smyslov. As the president of the Cerritos Chess Club (in California) at the time, we had the honor of having him do a simultaneous exhibition at our club. I had the additional pleasure of having him spend the night at my house. The most prominent impression of the man was what a complete gentleman he was. I have very fond memories of this man (who was about my father's age). He was (and I am sure still is) a very personable and charming guy with a great sense of humor.

Two weeks before the event, Isaac Kashdan (who was then the chess editor of the Los Angeles Times and the director of all of the Lone Pine tournaments) called me and told me that two Russian former World Champions, Tigran Petrosian and Vasily Smyslov, were going to be in town for the Lone Pine tournament. Petrosian would be going to New York after the tournament, but Smyslov would be staying in town for a while. Kashdan asked me if I would like to have Smyslov do a simul. I think I said "yes" before he finished the question!

Then, a few days before the exhibition, Kashdan called again and said that Smyslov would like to limit the number of boards to 45, but he (Smyslov) would bring his friend, GM Leonid Shamkovich, along to pick up the overflow, if any. He asked if that would be okay. Again, I was wondering if this was a trick question! As a result, we had not only Smyslov, but also Shamkovich... both in the same night!

Between the players and spectators, we had about 200 people in attendance. My longtime friend, the late Jerry Hanken (of *Chess Life*) was there and, after about two seconds of arm twisting; he agreed to make the introductions of not only Smyslov, but of several other VIP's in attendance. My good friend Ron Gross introduced Shamkovich. Ron is a USCF master, winner of the US Junior Speed Championship in 1955 (beating Bobby Fischer in the process), 4<sup>th</sup> place in the US Open 1966, one-time California Junior Champion and former California Collegiate Champion.

Smyslov played 46 boards (one guy sneaked in; we caught him, charged him, and let him continue anyway!) and Shamkovich played 12 boards. Finishing at about 1:00 am, the final scores were Smyslov: 39 wins, 7 draws (including Gross and Hanken), and no losses, Shamkovich: 10 wins, 1 draw and 1 loss. When Smyslov got down to the last game, someone offered him a clock (customarily, the last player is put on the clock). He waved it away, pulled up a chair, and let his opponent (Brian Scanlon) take all the time he needed to eventually lose a tough endgame (tough for Brian, anyway).

After the event, Ron took Shamkovich to his home to spend the night with him and his wife, Marilyn. Smyslov, Hanken, my wife (Arika) and I, and three others, went to a local restaurant. Smyslov, whose English was not that good at the time, told us some stories about several great chess players, and he told some chess jokes. He told us about his trip to Disneyland and Jerry told us of a picture he had of Averbakh and Stein on the Matterhorn ride (what a great Chess Life cover that would have made!).

We were all having a fantastic time, and we did not notice what time it was when we ordered some beer. A few minutes after receiving the beers, the waitress told us that she would have to collect the glasses in five minutes. We explained to Smyslov that, in California, alcohol cannot be served after 2am. He looked at his watch and said, "Oh, then I am in time-trouble!" The waitress stood by as he chugalugged his beer while looking at his watch and smiling at her between swallows.

After the restaurant, Smyslov came home with my wife and me to spend the night. He went straight to the piano (he was also a professional opera singer who would have sang for the Bolshoi Opera if he had not been so valuable to his country as being a chess player). He looked around and gestured, as if to ask, "Is there anyone that my playing and singing would disturb?" Of course, we said "no." In reality though, at 3:30 in the morning, I am sure we had a few startled and irate neighbors.

First, he sight-read Schubert's Serenade in Dm (which was on the piano

when he came in) and then he sang, from memory, three Russian Arias while accompanying himself on the piano. He was a tenor, and he sounded a lot like Caruso to me. It was breathtaking! It was a true performance. He obviously loved the music. He was making passionate gestures between the notes on the keyboard; his body swayed as he sang. His range of dynamics was from pianissimo to triple forte. It was the triple fortes that worried me when I thought about the neighbors! What an incredible experience it was!

The next morning I was able to play a skittles game with him. First, I hung a knight, which he gave back to me. Then, a few moves later, I put my queen en prise. He said to take it back. I argued politely that he should take it, that I had lost it. Then, he smiled, offered his hand and said “then it is a draw.”

I drove Smyslov and Shamkovich to the airport. Kashdan, and his wife Helen, met us there. We all had breakfast together. I had known Kashdan casually for a couple of years, but he was always reluctant to talk about himself (he was a modest man). At that breakfast, he talked about his heyday when he played people like Alekhine, Capablanca, Marshall, and Nimzovich. He had even scores against Alekhine and Capablanca, and beat Nimzovich both times he played him! He had wins against such illustrious players as Euwe, Colle, Horowitz, Santasiere, Marshall, Pinkus, Knoch, Flohr, Samisch, Mises, Bogolyubov, Stahlberg, Grunfeld, Vidmar, Maróczy, Steiner, Yates, Milner-Barry, Koltanowski, Reshevsky, Tartakower, Denker, Reinfeld, Elo, Hanauer, Chernev, Byrne, Collins, Pilnik, Yanofsky, Wade, Bisguier, Mednis, Evans, and Kotov (to name only a few).

Saying goodbye to Smyslov and the Kashdans that day ended a huge two-day episode in my life! Mowing the lawn, later that day, was a reality check!

## **MIKHAIL TAL (1936–1992)**

*World Champion (1960–1961)*

Mikhail Tal was a very intelligent man. He was in the university at the age of 15. He rose to fame rapidly—he won the Latvian Championship in 1953, by 1957, he was a master, by 1958 a grandmaster, and by 1960, he was the eighth World Champion. Tal, at 20 years of age and the youngest entrant, won the 24th USSR Championship in 1957. He was a surprise winner of that tournament, over players like Taimanov, Keres, Bronstein, and Petrosian.

In 1958, he not only won the USSR Championship again, but he also won the Portoroz Interzonal (2½ points ahead of 2<sup>nd</sup> place). In 1959 he won a strong tournament in Zurich and the Candidates Tournament in Yugoslavia (ahead of Spassky, Fischer, Petrosian, Gligorić, Olafsson and Benko, and including a 4-0 score against Fischer) to qualify for the world title match with Botvinnik (who he beat convincingly 12½ - 8 ½.) Between 1957 and 1960, he was almost unstoppable.

He won the World Championship at the age of 23. This made him the youngest winner of the world title to that time (Morphy was 21, but his title was unofficial, and Kasparov later won the title at 22). He played in seven Olympiads and had a total score of 59 wins, 31 draws with only two losses. During his reign as champion, he only lost one game before his rematch with Botvinnik.

Mikhail Tal smashed the world's best and in 1960 became the youngest world champion in history. He served his opponents his pieces with such vigor that many of them were totally confused by his sacrifices. It did not matter what they did—whether accepting his presents or refusing them, reacting quickly to some bluffs or taking too much time to deny his little jokes, or countering his demonic stare with sunglasses—they were victims of his generosity. Tal prevailed. His attacks were full of intuition and imagination, taking into account that another human being was sitting across the chessboard and could err. (Lubomir Kaválek, *World Cup Chess*)

He has been called the “Paganini of Chess,” “the Magician of Riga,” “the devil from Riga,” and the *Chevalier sans peur et sans reproche*. He is probably most famous for his wild sacrifices. Tal’s games are loaded with bold sacrifices. “Tal always preferred to err on the side of boldness, and of course he went for the sacrifice” (Larry Christiansen, *Storming the Barricades*).

Lasker, Capablanca, Alekhine, Euwe, Botvinnik, Smyslov, Tal, Petrosian, Spassky, Fischer, Karpov, Kasparov, Kramnik. World Chess Champions! And what are they famous for? For being World Chess Champion. Really only Mikhail Tal is remembered for his style of play and spectacular sacrificial games. The others all played (or still play) wonderful chess but they will be remembered more for what they achieved rather than how they did it. (John Walker, *64 Things You Need To Know In Chess*)

His sacrifices were not superficial attempts to delight the spectators. They were based on his ability to analyze quickly and to assess correctly the winning chances that resulted from the sacrifices. He was always on the watch for a potential sacrifice. He was not concerned as much about whether he had the better game as he was in finding the tactical breakthrough that would win it for him. He would sacrifice for an attack. He would sacrifice for complications alone. He would sacrifice for activity. His sacrifices were not always sound, but they were good enough to stump the world’s best players over-the-board. “Tal once told me in jest that there were two kinds of sacrifices: Tal sacrifices and correct ones” (Larry Evans, *Chess Catechism*).

Tal’s thinking process about sacrifices was the reverse of the way most players think about them. Tal’s thinking was that he should sacrifice unless it could be positively shown to be unsound. His sacrifices had a big psychological impact on his opponents. The reaction has been described as like being slapped in the face. His sacrifices were so legendary, that to this day, his name is associated with the concept of a brilliant sacrifice (“it was a Tal-like sacrifice”).



“Do you want to know how Tal wins? It’s very simple. He arranges his pieces in the center and then sacrifices them somewhere” (David Bronstein, *Grandmaster Secrets, Openings*, Andrew Soltis).

Tal was also best known for his brilliant tactical play. He was often called the best tactical player of his time. In sharp positions, his combinational powers were second to nobody’s. He is often thought to have surpassed even Alekhine in his combinational abilities. His dazzling combinations often came from out of nowhere, and they would shock his opponent into a state of panic.

If the sacrifices blend with the demands of the position, Tal is frightening. In his conduct of an attack one senses the influence of Morphy. Tal is a master of attack, of piece play; when attacking he opens everything up and deals especially well with a king in the center. He calculates variations deeply. He is very wily in exchanging. (Mikhail Botvinnik, *Return Match for the World Chess Championship Botvinnik-Tal Moscow 1961*)

A 20th-century Romantic, his style exhibited all of the typically Soviet elements. His play was dynamic. He liked to gain the initiative. He constantly sought the initiative and, once he had it, he would not let up. He knew that, by having the initiative, it gave him more choices in every position.

He had a great chess intuition. In difficult positions, he could find the right path intuitively. His style has been labeled as creative, bizarre, bold, innovative, cavalier, fearless, and devil-may-care. “One had to play against Tal with a redoubled degree of caution, and to watch carefully for volcano-like eruptions of his chess fantasy” (Yefim Geller, *The Application of Chess Theory*).

He seemed to play for the delight of the fans. Outside of Morphy, no one had captured the public’s fancy more than Tal had. He admitted that he loved to hear the spectators react to his sacrifices and that he liked pleasing the audience.

I am not a great lover of sitting down for a long time in one place. I like improvisation and quick games with friends. However, once I get really interested I can forget all about meal times, appointments or even going to bed. On the other hand I can go days without looking at the board. (Mikhail Tal, *Tal's 100 Best Games*, Bernard Cafferty)

He was renowned for his attacking prowess. To say he had a flair for attack would be understating it. He was called an attacking genius. "If Misha has just one open file, he will give you a mate" (Alexander Koblents, *Chess Art and Struggle*, Eduard Gufeld). He was probably the greatest attacking mastermind of all the World Champions. He could turn the board into fireworks, no matter how peaceful it looked.

He had an astonishingly rapid sight of the board and was incredibly fast at analyzing. He could see lengthy variations almost instantly. Even though his games are so complicated, he played much faster than his opponents did. He hardly ever got into time-trouble.

It is not possible to be a World Champion without being an accomplished positional player and, of course, Tal was. He preferred the open positions, in part, to make it harder for his opponents. He would develop his pieces before mixing it up or making pawn breaks. "Tal is renowned for his sacrifices and combinative play; but examination of a number of his games will reveal that he is also one of the very best masters of the use of tension in building an offense" (Riley Sheffield, *Tension in the Chess Position*).

Some thought that he had no respect for his opponents and would intimidate almost everyone he played.

Tal tries to unnerve his opponents by staring at them while they're thinking, and those large, wild-looking eyes of his seem capable of frying you in your chair. The amazing games he played early in his career led some reporters to suggest that this "devil from Riga" was hypnotizing his

opponents. (Pal Benko & Burt Hochberg, *Winning with Chess Psychology*)

He was always willing to go into deep complications. With his enormous creativity, normal moves were rare. He would present his opponent with huge calculation challenges. They never knew if they were looking at a decisive combination or a bluff. This would cost his opponents large amounts of time on their clocks to determine. “He would often sacrifice for an attack that looked theoretically inadequate, on the grounds that defense requires more calculation than attack. The defender has to think of everything the attacker may do” (Cecil Purdy, *Extreme Chess*).

One of Tal’s favorite methods was to deliberately fall into the traps prepared by his opponents just to finally prove that his calculation was more accurate, and that the roles of the hunter and the prey can be easily reversed. (Mihail Marin, *Learn from the Legends—Chess Champions at Their Best*)

He had the attitude that, the more complicated the game, the better because he assumed his opponent would make more mistakes than he did. He had no fear of defeat. He was prepared for a certain number of defeats. He just wanted to lose less often than he won.

He had a great sense of humor and the kind of personality that predisposed him for his sacrificial style.

Tal’s success as a sacrificer resulted from both his personality and his mental faculties. He loved a fight. He had great intuition, a rich imagination and a love of beauty. He was able to calculate at great speed and visualize future positions with remarkable clarity. He had an uncanny judgment of the effects of strange material imbalances. He had a great sense of humor, one effect of which was to help him to see paradoxical ideas. (David Le Moir, *How to Become a Deadly Chess Tactician*)

He was almost unbeatable in blitz. To him, chess was fun. He could be playing an important game later in the afternoon and be found playing dozens of skittles games a few hours before the game.

The story goes, that at the time Tal was playing Danish GM Bent Larsen in the tournament, he was also playing a blitz match with GM Hermann Pilnik from Argentina (who played in the 1956 candidates!) in the corridor outside the playing hall. All the time Kan (the captain of the Soviet team) had to drag Tal from the blitz table to the tournament hall. The story goes that Pilnik did not score a single win and Larsen was crushed in 25 moves!” (Bragi Kristjansson, *Squares*, Winter 2003)

Tal could easily have been the Soviet Union’s most prolific chess journalist to date, but he only wrote one book: *Tal-Botvinnik 1960—Match for the World Championship*. Tal’s health was always an issue.

He took every conceivable precaution against reaching old age, abusing a naturally frail constitution with smoking and drinking on a heroic scale. If he had looked after himself and ever worked at the game, he could have been one of the pantheons of chess gods. But then he wouldn’t have been Tal. (B.W. Malpass, *Bluff Your Way in Chess*)

## ***TIGRAN PETROSIAN (1929–1984)***

*World Champion (1963–1969)*

About a decade before becoming World Champion, Tigran Petrosian’s style was energetic. However, as he got stronger, he decided that to become World Champion, his focus should be on avoiding the loss of games rather than on winning them. He beat Botvinnik (for the title) in 1963 because Botvinnik could not adapt to his style (incidentally, this was Petrosian’s first match of his life).

He also beat his first challenger, Boris Spassky, in 1966. By winning that match, he became the first champion since Steinitz to defeat his closest rival in a match. In ten Olympiads for the Soviet teams, he scored an incredible 79 wins, 50 draws and only 1 loss.

Called “The tiger from Yerevan” and “the Russian Capablanca,” Petrosian was influenced mostly by Capablanca and Nimzovich. He was a great endgame player. From Capablanca he learned the Classical approach. From Nimzovich he learned restraint and prophylaxis.

Petrosian took Nimzovich’s idea of prophylaxis to another level. His goal in a game was to paralyze his opponent, to prevent them from being able to do anything constructive.

The result was a unique playing style that opponents found very hard to handle. Often it wasn’t even clear what they were fighting against, as Petrosian’s deeply prophylactic play would be preventing ideas that had not even occurred to them. (Graham Burgess, Dr. John Nunn & John Emms, *The Mammoth Book of the World’s Greatest Chess Games*)

He could anticipate danger and knew how to avoid it. After restraining his opponent, he then (and only then) starts hostilities. He also was enthusiastic about overprotecting any potential weakness (another of Nimzovich’s ideas).

Petrosian was the quintessential positional player. Just as Tal’s name was synonymous with the tactical/attacking style, Petrosian’s was with positional play. Of course, he was also adept at tactics.

Tigran Petrosian is world famous for his positional play. His positional sense alone, however, would not have been enough to make him World Champion. Although tactical combinations are rare in his games, when he does resort to one his opponent can be certain that everything is correct and the combination is crystal-clear. (Vlastimil Hort & Vlastimil Jansa, *The*

*Best Move)*

His style has been described as a defensive positional style. “He is considered one of the great defensive players” (Eduard Gufeld, *Exploiting Small Advantages*). He was not a seeker of the initiative; on the contrary, he preferred to defend. His play was usually non-committal. He would gradually improve his position while keeping his options open until just the right moment to launch an ambush.

His style still falls under the “Soviet School” label since his defensive technique was in an active style and in accordance with the principles of that school. His general method was to exchange pieces and maneuver without taking unnecessary risks. The merit of this method was that a draw was usually available if the win was not achieved. “Tigran Petrosian was one of the best defensive players; he had a gift for sensing the hidden dangers in a position, and he was nearly invincible in defending difficult positions. He lost just one or two games per year” (Zdenko Krnic, [Chesssafe.com](http://Chesssafe.com)).

A trademark of his was the exchange sacrifice. He pretty much popularized it. He made some valuable contributions to the understanding of the positional exchange sacrifice. When books discuss the subject, invariably they refer to him.

Petrosian really put the “positional” into the positional exchange sacrifice, and specialized in giving up the exchange to salvage apparently lost positions. This remarkable genius of the game repeatedly broke through the material barrier, finding new ways to exploit the good qualities of his minor pieces against suddenly sluggish rooks. (John Watson, *Secrets of Modern Chess Strategy*)

The exchange sacrifice was as common in Petrosian’s games as the tactical sacrifice was in Tal’s games. “Petrosian was famous for his positional exchange

sacrifices. When once asked which of the chess pieces his favorite was, he replied, only half-jokingly, that it was the rook, because he could sacrifice it for minor pieces!” (Steve Giddins, *50 Essential Chess Lessons*).

He won many games based on the sacrifice of the exchange. Since Petrosian, and largely because of Petrosian, players have become much more aware of the potential for exchange sacrifices, both as a threat and as a device.

His openings often involved late castling and castling into seemingly exposed king positions. Slow development was another characteristic of his openings. He did not go out of his way to gain the initiative; rather, he would deploy his pieces for maximum scope and flexibility in order to answer any threat.

His games were distinguished by lots of maneuvering. Botvinnik once said that Petrosian’s style was not fully understood. Petrosian’s penchant for maneuvering was largely responsible for this mystique. He would play moves that seemed harmless, but the accumulated effect of them was often decisive.

His play is deep, and he has very original ideas—strategical, but of course, a little bit pragmatical. During the game, he plays like a very nice cat. But, this is not real because after that he becomes like a tiger. (Boris Spassky, *Spassky’s 100 Best Games*, Bernard Cafferty)

He would maneuver by deciding which piece he needed to improve and simply transfer it to a better square - all the while avoiding risks. These, more or less intuitive moves, would have the added benefit of saving time on the clock.

His lengthy piece maneuvers were often beyond comprehension to the spectators. He would often maneuver his pieces to a corner of the board or back to the first rank. He had enormous patience and he would apply a little pressure here; a little threat there, and soon his opponent would have too many defensive problems to cope with. “Petrosian’s patience and apparent

slowness often had a lulling effect on his opponents” (Dražen Marovic, *Secrets of Chess Transformation*).

He was the all-time “master marcher,” as Andrew Soltis called him. He was known for moving his king from an apparently safely castled position to another safe spot on the other side of the board so he could start an offensive on the side where the king was originally.

His blitz play was reputed to be second only to Fischer. Even though he rarely went in for them, he could see combinations immediately.

Everyone marveled at the ease with which he found the best moves so quickly. Like the young Capablanca, he did not know what time-trouble was. No one could match him in five minute chess, and he won the Moscow five minute championship several times. When Petrosian began traveling abroad, he easily beat everybody who challenged him at lightning chess, notably Najdorf who considered himself the strongest in this domain. (Count Alberic O’kelly de Galway, *Tigran Petrosian, World Champion*)

His typical approach to the game was to close it up and then outflank his opponent. He contributed enormously to the theory of playing with a blocked center. Quite often, he would lock up the center and then peck at the edges of the opponent’s pawn structure with moves by the b-pawn or g-pawn. “Petrosian specialized in blocking the center and outflanking his opponents with pawn moves on the wings. Fischer has talked about the Petrosian ‘bear hug’ that grips a careless opponent” (Neil McDonald, *The Giants of Strategy*).

He was a skilled tactical player as well as a positional one. “Petrosian, a supposedly positional player, is almost faultless in his execution of tactical operations” (Nikolai Krogius, *Psychology in Chess*). He could calculate variations with extraordinary speed and precision; he just did not exhibit this talent often with his moves (but they were in his analysis). He was aware of the tactical



possibilities on the board, but chose to avoid risk whenever possible (a tactical battle would disrupt the flow of his long-range plan). Like Capablanca, he only went into a combination if it was correct and decisive.

There is a story that when Petrosian was asked how he managed to beat relatively weak opponents with no particular trouble, he replied that he would arrange his own position and then wait for them to start playing in 'Chigorin style.' In such patent disdain for the active tactical approach, an entire chess philosophy is expressed. (Viacheslav Eingorn, *Decision-Making at the Chessboard*)

The same was true with a sacrifice. He only sacrificed if it was conclusively correct. Other than the sacrifice of the exchange, there are relatively few sacrifices in his games.

Not surprisingly, Petrosian was also famous for draws. His percentage of draws was much higher than most of the other Soviet masters. It often seemed that he made no effort to win, but he was rarely beaten either. First place finishes were comparatively rare for him, but so were bad tournament results. Still, he also had many brilliant games that ended in draws.

"Petrosian always treated innovations with respect. He never tried to refute them at the board, but looked in the first instance for the safest continuation" (Victor Korchnoi, *My Best Games, Vol.1*). He was a careful player. Gross blunders and oversights were almost completely absent from his play. He always wanted to avoid risks. "He is considered to have had a particularly acute sense of danger" (Angus Dunnington, *Chess Psychology*).

His first priority was safety. An attack would only come after his safety had been assured. As a result, there are relatively few crushing attacks in his games.

In an article in the Russian press, he defended his style by claiming that it

was necessitated by the nature of the game. “Obviously,” he wrote, “many people forget that nowadays in chess, struggle for points prevails over creative considerations... It is naïve to think that it is expedient (let alone possible) for a player striving for the top place in a tournament to play every game all out, putting all his creative energy into every encounter. (Pal Benko & Burt Hochberg, *Winning with Chess Psychology*)

He had the ability to calculate deeply and accurately, but he mainly possessed a great intuition.

Petrosian was basically an intuitive player. Describing his algorithm of thinking, Botvinnik once wrote that, move by move, Petrosian decided which piece needs to be transferred to a better square and then just transferred it. No deep calculation, no long variations, just pure intuition. It is true that this is partly a supposition, since on another occasion the same Botvinnik stated that Petrosian was the only great player whose style of play has not been totally decoded yet. I would also underline that we could not hope for a more qualified analyst on this territory, since Botvinnik had examined Petrosian’s games in depth before their world title match in 1963. (Mihail Marin, *Learn from the Legends—Chess Champions at Their Best*)

## ***BORIS SPASSKY (1937–)***

*World Champion (1969–1972)*

When he was ten years old, Boris Spassky was the only first category player of that age in his country. At 16, he was the youngest international master in the world. He was the first Russian to play in the Junior World Championship and the only one to win it until Karpov in 1969. He won the title of Junior Champion of the World in 1955 at the Antwerp International

Tournament. As a result, he was awarded the title of international grandmaster.

He was, at the age of 18, the youngest player in the world with the grandmaster title. Also at 18, he was the youngest ever qualifier for the Interzonal (Fischer later lowered that record by three years). Even before Spassky became World Champion, he was on Bobby Fischer's personal list of the ten best players that ever lived. He was successful at winning the World Championship on the second attempt.

He did not have a distinct style. He could handle all kinds of positions and adopt whatever style was appropriate under the circumstances. He could be aggressive or defensive, use intuition or calculation, play classically or dynamically. If one were to compare him to anyone, his most closely resembled Alekhine's style. "Universal" is probably the best word to describe his style. He played every style of the game. "As a player he was in general more intuitive than calculating, classical rather than irrational, and practical rather than analytical" (Alexander Raetsky & Maxim Chetverik, *Boris Spassky, Master of Initiative*).

Boris Spassky was the first player in chess history considered to be universal in his style: good at attack as well as defense; happy to play tactically as well as positionally. Together with Viktor Korchnoi and Anatoly Karpov, he is the only player to have made it all the way through the candidates matches to play for the World Championship more than once. (Alexander Raetsky & Maxim Chetverik, *Boris Spassky, Master of Initiative*)

"Boris Spassky's ...classical and methodical attacking games made a strong impression on me" (Larry Christiansen, *Storming the Barricades*). Often, his games were full of tactics. Sacrifices were plentiful in Spassky's games; not at the level of Tal, but they were abundant nonetheless. He could be aggressive

when the opportunity was right for an attack, or entirely comfortable on the defense.

On the outside, Spassky was a poker player. He could blunder a piece and you could not tell from his expression if it was a blunder or a sacrifice. On the inside, he was always nervous and unsure of himself. He was possibly more inclined toward self-doubt than any other World Champion since Morphy.

When I am in form, my style is a little bit stubborn, almost brutal. Sometimes I feel a great spirit of fight, which drives me on. But, deep down I lack faith in myself. I have often found that I have caught the basic idea of a position, the correct plan, but my great weakness is that I fail to follow the logical pattern through from beginning to end. Sometimes I get very annoyed with myself at this and then I begin to play professional chess—not the strongest moves but quite good and technically correct ones. Actually, I feel very nervous inside during a game—as if there was an explosion in progress. When I make a mistake, I try to keep myself under control, to remain quiet and calm, and to find the best way out. During a game I seem rather unruffled, but this is not really so. It is like a clown's face put on for the occasion. When I appear particularly calm, I am really feeling especially nervous. (Boris Spassky, *Chess World Championship 1972, Fischer vs. Spassky*, Larry Evans & Ken Smith)

He considered himself lazy because he did not prepare for months for a tournament like the old masters did. He said he made up for that laziness by working much harder over-theboard. In spite of this extra effort, though, he was rarely in time-trouble. His self-deprecation aside, he was always a tough and creative opponent and ready for a fight. He was always vigilant and would capitalize on his opponent's inaccuracies immediately.

He played all openings, king pawn open games and positional queen pawn openings alike. Still his games were distinguished by the extra-sharp openings.

He liked to confront other masters with their own pet lines.

“Next to me Spassky’s the best. I don’t say that to brag. I think it is true”  
(Bobby Fischer, *Chess World Championship 1972, Fischer vs. spassky*, Larry Evans & ken Smith).

## ***BOBBY FISCHER (1943–2008)***

### *World Champion (1972–1975)*

At the age of six, Bobby Fischer got absorbed in the game. He knew right away that the only thing he ever wanted to do was to play chess. He decided when he was eight or nine years old that he wanted to become the World Champion. His I.Q. was in the 180’s, but he had no interest in school, just chess. He read chess books voraciously. He said he read a thousand chess books and that he learned the best from each of them.

He was playing at master strength by the time he was 12 years old. When he was 13, he won the national junior championship. At 14, he won the US Championship. At 15 he became the youngest ever World Championship candidate by winning fifth place in the Portoroz Interzonal in 1958. In 1959 in Zurich, he took third equal with Keres (after Tal and Gligorić). By the age of 16, he was making a living playing chess. In 1961, he took an undefeated (8 wins and 11 draws) 2<sup>nd</sup> place at Bled behind Tal, but ahead of Gligorić, Keres, Petrosian, and Geller. He won the 1962 Interzonal in Stockholm with another undefeated score of  $17\frac{1}{2} - 4\frac{1}{2}$  (13 wins and 9 draws)  $2\frac{1}{2}$  points ahead of second place. He won the US Championship in 1963–64 with a perfect 11-0 score,  $3\frac{1}{2}$  points ahead of 2<sup>nd</sup> place Larry Evans. By winning his eighth consecutive US Championship in 1966–67, he qualified for the next Interzonal.

In the Sousse Interzonal in 1967, while winning with a comfortable lead after ten rounds, he withdrew because of a dispute. This set him back three more years in his quest for the world title. In 1968 he won at Natanya with

another undefeated score of  $11\frac{1}{2} - 1\frac{1}{2}$  (10 wins, 3 draws) and again an undefeated first place at Vincovci 11-2 (9 wins, 2 draws). By the time he was 25, in 1968, he had played more tournaments and match games than Anderssen, Morphy, Steinitz, Lasker, and Capablanca had played in their entire careers.

After a self-imposed exile from chess for a year and a half, he came back in 1970 to win Rovinj-Zagreb, 13-4, and the Interzonal tournament in Buenos Aires, 15-2. Fischer lost his right to continue in the Interzonals because he refused to play in the 1970 US Championship (because of the conditions). However, Pal Benko gave up his place to let Fischer play in the Palma de Majorca Interzonal. Fischer won that tournament  $18\frac{1}{2} - 4\frac{1}{2}$  ( $3\frac{1}{2}$  points ahead of 2<sup>nd</sup> place).

In the Candidates matches, he summarily overwhelmed the top players of the day as though they were rank beginners. He scored 6-0 against Mark Taimanov and 6-0 against Bent Larsen... almost unbelievable scores at that level. Then, he went on to beat the former World Champion, Tigran Petrosian by the score of  $6\frac{1}{2} - 2\frac{1}{2}$ , which included a 4-game winning streak (and this was in a match in which he was ill). "In all, counting the first game in the Candidates' final match against Soviet Tigran Petrosian, Bobby Fischer won 20 games in a row against the best chessplayers in the world (except for the World Champion Boris Spassky, of course)" (Timothy Hanke, *American Chess Journal*, Premiere Issue). His total score for the three Candidates Matches was an unprecedented  $18\frac{1}{2} - 2\frac{1}{2}$ .

His tactical strength was at a mature level even as a youngster. Furthermore, in his youth, his endgame technique was on the level of the young Smyslov and the young Capablanca.

In 1972, Fischer was far ahead of his contemporaries. Barring Morphy, he was probably the greatest player of all time relative to his colleagues. "At his peak, he was the best chess player who ever lived. His aggressive, uncompromising style, going all out for a win in every game, is rarely seen in

top-level chess” (Bill Goichberg, *Chess Life*, March 2008).

His great talent appeared on the international chess scene at a time when the tension between the super powers of the United States and the Soviet Union was still in full force. Because the Soviets had attached so much political importance to their dominance in chess, the dethroning of their champion was significant to both countries.

Called the “Match of the Century,” the 1972 World Championship Match between Boris Spassky and Bobby Fischer was more than just a chess match. It was a high-profile international political incident and a drama-filled media event as well. No chess match in history received as much media attention. It was the start of the biggest chess boom in American history. “Over night, Bobby Fischer put chess on the map of America” (Anthony Saidy, *Anything to Win*, TV special).

Despite all of the antics, over the board Fischer worked hard at each of the games. He was trying his best to win the title. The games were not filled with theoretical novelties or secrets. Fischer prevailed because of his pragmatic approach. He efficiently made use of use all the potential in each position in order to make the draw or to win the game.

Why was Fischer so strong? To begin with, his knowledge of the game and its past was enormous. He was an avid reader, devouring any chess book or magazine that came into his hands. He studied other chess giants, picking up the best ideas and improving on them. His opening play was deadly... Fischer’s greatest games were crystal clear, simple and beautiful. His attacks had the precision of a laser beam. He played endgames more accurately than the phenomenal world champion José Raúl Capablanca. The logic behind Fischer’s moves was easy to grasp, but hard to imitate. He was a complete chessplayer with a tremendous will to win. It was scary to play him. (Lubomir Kaválek, *British Chess Magazine*, March 2008)

When the time came for the next championship match, FIDE (for the first time in 20 years) changed the conditions for a title match from the best of 24 games to the first to win six games. Fischer countered with the first to win ten games. His demands were unacceptable to FIDE. Fischer's title was taken from him by FIDE because he refused to defend it under the terms set forth by them. Consequently, he never played a title defense.

Fischer could get good positions from his openings because of his thorough preparation. He spent a lot of time studying his openings. Because of his superior home preparation, he often had the game effectively won right out of the opening. He had the kind of work ethic that Alekhine had and the same fanatical devotion to chess. He loved the game. "Fischer was obsessed with the idea of raising the prestige of chess in the world" (Eduard Gufeld, *Bobby Fischer from chess genius to legend*). Like Alekhine, he carried a pocket set with him all the time and would be analyzing positions wherever he was. "I think my subconscious mind is working on chess all the time—even when I'm not playing or studying" (Bobby Fischer, *Chess*, December 2007).

He liked active play in the opening. He played sharp openings. He played openings like the Fischer-Sozin Attack as white and the King's Indian Defense and the Najdorf Sicilian as black. He looked for lines that were out-dated or even considered inferior, and he would breathe new life into them through home analysis.

He was alert at catching mistakes made by his opponents in the opening. When he did, he would capitalize on them immediately. He would be keenly aware of even the slightest imbalances in the opening and take advantage of them as well.

He was not known for opening innovations, or for having a large repertoire, but he had great depth of knowledge in the openings that he played and he was aware of all the new ideas. He was thoroughly prepared on his systems and thought in terms of systems instead of moves. Every move he



made was a part of the system he was using. Spassky acknowledged that Fischer's knowledge of the openings was greater than his was.

He was known for his uncanny ability to transform one advantage into another one at just the right time. He would trade material for the initiative and an attack, or a positional advantage for material. This way, he was often able to convert an advantage into a technically won game. Petrosian said that when Fischer got the advantage, he played like a machine and that you could not even hope for a mistake. Tal said that, when Fischer had an advantage, he would nearly always convert it into a win. He would sense imbalances.

His style was deeply rooted in a strong positional understanding. He has been called a "perfect" positional player. Like Morphy, he would use his strong positional understanding to create positions that were tactically ready for him to capitalize on.

He was the master of all forms of endgames. There have been only a few endgame players of his caliber, so he was always prepared to head for the endgame.

His technical ability was second to no one. Tal said Fischer's technical ability was at the level of automation. "Since I am mainly responsible for the evaluation function in Rybka, and since Fischer was the No. 1 influence on my own chess career, a lot of Rybka's evaluation can be said to be second-hand knowledge from Fischer" (Larry Kaufman, *Chess*, April 2008).

Imagine: without a proper team, without a computer, without other 2700+ players! His 2780, even today, would be enough to secure the number two or three spot on the rating list. This is unbelievable. Actually, all the world champions are great sportsmen and deserve the deepest respect. But Fischer is the most brilliant champion for me. (Ernesto Inarkiev, [Chesscafe.com](http://Chesscafe.com))

You cannot talk about Bobby Fischer without mentioning bishops. He

valued bishops highly and his ability to use them was phenomenal. No one has ever matched his endgame use of bishops. He especially preferred the king's bishop (as in the King's Indian Defense and Sozin Attack). He was fond of the bishop pair and did not part with it unless completely necessary. Another of his trademarks was the pawn advance g2-g4.

He was a classical player. He applied all of the longstanding chess principles. He tried to maintain a healthy pawn structure. He insisted on maintaining the tension. It was rare for him to have a bad piece (he would exchange them).

After the opening, he always developed a plan. "In Fischer's games it is easier to explain the strategical backbone than in the games of any other player—perhaps even more so than in those of Capablanca" (John Collins, *Maxims of Chess*).

He is considered to have had a "universal" style. "Chess players of universal style, who handle any type of position with equal competence, are extremely rare. Bobby Fischer was one such player" (Mark Dvoretsky & Artur Yusupov, *Attack and Defense*).

He was a true universal player, but he also adhered to the principles of classical chess. There were no tricks or bluffs in his games. He had a classical approach to building up a positional advantage. Taimanov said that you could often guess his moves; you did not have a sense of danger until it was too late. He was playing with the perfection of a Capablanca. He hardly ever made a mistake.

He was known to seek the Ultimate Truth in chess. For instance, he would actively seek a defensive position if he thought that it was the correct way to win. He always chose sharp defenses with the black pieces, striving for positions of dynamic imbalance with active counter chances. (Allan Savage, *Squares*, Summer 2003)

He had a fantastic memory, some say even legendary. He knew thousands of lines, positions and entire games. It has been said that he could recall every game he ever played.

Tal called Fischer “the greatest genius to have descended from the chessic sky.” However, Fischer might not have considered that a compliment. “I object to being called a chess genius, because I consider myself to be an all around genius who just happens to play chess, which is rather different” (Bobby Fischer, *Chess*, December 2007).

Once a young lady collecting autographs approached Fischer. All excited, she handed over a clean sheet of paper to him. Bobby put his signature across the whole page. When the girl pointed out to Fischer that he had left no room for other autographs, he answered “The autographs of others are just nonsense!” (Eduard Gufeld, *Bobby Fischer from chess genius to legend*)

Fischer was influenced by many great players, including Morphy, Steinitz, and Capablanca. His style probably resembled Capablanca’s more than anybody else’s. Botvinnik said that Fischer’s style reminded him the most of Smyslov in his youth. They shared a similarity in the way they built up the position in a classical way.

Fischer influenced and inspired many great players. “As a young player in the 1960’s, I dreamed of playing chess like Bobby Fischer. Everyone did. Even those he derided as “Commie cheaters” admired his direct style and his relentless search for the secrets of the game” (Jack Peters, *Rank & File*, March–April 2008).

One of Fischer’s most conspicuous characteristics was his extreme will to win. He would fight from the first move to the bare kings, making the best of every chance right to the end. His will to win struck fear in most of his opponents. Even when the win was secure and just a matter of technique, or if first place in the tournament was already assured, he would still play with a

fierce drive to win.

One of his teachers said that: “No matter what he played, whether it was baseball in the yard or tennis, he had to come out ahead of everybody. If he had been born next to a swimming pool he would have been a swimming champion. It just turned out to be chess. (Iain Reeve, *Chess*, May 2008)

“Fischer’s whole career has featured a sharp attacking style of chess” (Yasser Seirawan, *Winning Chess Brilliances*). He believed that chess must be played offensively. He had a sharp and aggressive attacking style. He was relentless and allowed no opposition. Once he had the initiative in an attack, his opponent would rarely get any kind of counterplay. “Fischer’s restless energy in attack is reminiscent of the fire and dash of that other prodigy who dazzled the chess world with his mastery—Paul Morphy” (Irving Chernev, *The Most Instructive Games of Chess Ever Played*).

Ironically, Fischer was proficient in the Soviet tradition of dynamic chess. His seeking of the initiative is legendary. His style was dynamic. He always tried to keep the game alive by fighting for the initiative or defending actively. Garry Kasparov even said that modern chess started with Fischer. “Not without reason was he called the best pupil of the Soviet Chess School” (Garry Kasparov, *My Great Predecessors Part IV*).

He hated draws and almost never accepted them. He did not go in for short “grandmaster draws.” His fighting spirit was incredible. He hated the idea of losing and did not even want to think of it. He believed in giving his opponent some counterplay, if that meant avoiding a draw and, at the same time, giving himself better chances to win. He would try to win every game, even as black. He was a fighter to whom only victory mattered. He wanted to crush his opponent.

There are many books filled with his beautiful combinations and tactical

brilliances. He was always alert for tactical opportunities and was able to connect them with the positional concepts that were involved as well. He had a knack of finding intermediate moves in even the most complicated positions. He had tremendous tactical talent and an awe-inspiring ability to calculate variations. His calculations were rapid, deep, and accurate.

He was able to remain objective both when he was attacking and on defense. He was always looking for the truth in a position. He would play the best move, not the optimistic or pessimistic one, or the one that suited a particular taste or style. He was entirely pragmatic in his approach to the game. His sound practical approach prevented him from chasing after beautiful or creative moves when they were not the surest way to win. His moves were based on a faithful adherence to the principles of correct play, as he saw them, and the alertness to capitalize on the mistakes of his opponents.

He had an incredible and immediate sight of the board and could quickly understand and solve all of the problems in a position. Time-trouble was rare for him.

Unlike Anderssen and Rubinstein who started their chess careers at a much later age, Fischer has the ability merely to glance at a position and thereby grasp its nuances and difficulties. That is why, like Capablanca (and Morphy), he has one of the fastest total sights of the board in the history of the game. In Fischer the machinery of thought from mind to board transmits itself so quickly it often appears as the same process. (Frank Brady, *Profile of a Prodigy*)

His quick sight of the board is one reason why he was such a fantastic blitz player. As with Tal and Anand, the faster the game, the better he does relative to everyone else. Even in his blitz games, the games are conducted with the same objectivity and avoidance of tempting sidelines, as were his tournament games. In 1970, he won the Blitz Tournament of the Century. He scored 19 of 22

and placed far ahead of Tal, Petrosian and Korchnoi (who were all incredible blitz players in their own right). He was 4½ points ahead of the runner-up (Tal) and finished most of his games with plenty of time to spare. After the event, he replayed all of the moves from all of his 22 games from memory. Despite his talent for it, Fischer did not like speed chess. He thought it stifled creative ideas.

He was partial to material. He would, like Capablanca, tend to accept a gambit and try to hang on, rather than pass it up. He would, sometimes, grab material that a lesser player would even pass up, and return it at the right time for a gain in initiative or some other advantage.

He will always grab a pawn even if he has to cede the initiative and undergo considerable difficulties to make the extra material count. This style of play is strongly reminiscent of that of W. Steinitz who taught that it is sound to grab a pawn if you have a sufficiently solid position to repulse the attack. (Ken Smith, *Chess World Championship 1972, Fischer vs. Spassky*)

His imagination was disciplined. He was not a risk-taker in the sense that he would play speculative moves. He very rarely played a speculative sacrifice. His moves were concrete, calculated and based in logic. He was also a tenacious defender, handling that phase tactically with counterplay whenever possible. He could complicate a position with the aim of causing his opponent to make a mistake. “No one is harder to beat in an inferior position” (Robert Byrne, *Squares*, Summer 2003).

Despite his off-the-board antics, he was known for impeccable behavior at the board. He did not complain in order to upset his opponent. In fact, often he was concerned about the conditions for both players. At the board, he was a gentleman; he was polite and well mannered. He did not appreciate indecency or disrespect between players.

In addition to the purely chess inheritance Fischer left us, he was also the first grandmaster to actively fight for an improvement in the general conditions of play in tournaments. Silence, the intensity of light in the playing room, and a higher level of appearance fees were among Fischer's main concerns. Although he was often criticized for this, sometimes in a sarcastic way, by the commentators (mainly Soviets, of course), no one can deny that most of the players in the 1970's and 1980's could practice their favorite game as professionals mainly because of Fischer's efforts. (Mihail Marin, *Learn from the Legends—Chess Champions at Their Best*)

“Grandmaster W. Lombardy, who knew Fischer well, described him as a ‘riddle wrapped in an enigma’” (Eduard Gufeld, *Bobby Fischer from chess genius to legend*). Psychologically, Fischer was complicated. Leaving his political outbursts and speculations as to his mental state aside, he had a huge capacity for work and was tenaciously dedicated to his point of view, no matter what it was. He was sensitive to injustice, but only from his perspective. He could not empathize with the other side. He had a strong belief in his own abilities as a chess player.

To think of Bobby Fischer is to think of contradictions—purity and complexity, disarming innocence and shackling suspicion, consummate talent and tantalizing reluctance. He surpasses all in comprehending the chess pieces, but trails in understanding himself. Somehow his conviction of the highest destiny is yet admixed with a hint of foredoom. (Anthony Saidy, *The Battle of Chess Ideas*)

“Chess was not, for him, a form of play as much as it was a sport. He trained himself to win; physically, psychologically, and in terms of his chess knowledge” (Shelby Lyman, *Anything to Win*, TV special).

Fischer had a reputation as a good annotator. His comments and

observations were direct and honest.

Bobby Fischer brought more excitement to chess than any other player since Paul Morphy. He had a huge impact on the game and, even though he was only the World Champion for such a short time, he dominated the chess scene to such an extent that it will always be referred to as the “Fischer Era.”

It is inevitable to compare Fischer with other great players. “Fischer’s Elo rating may have been slightly surpassed by Kasparov’s, but we have a sneaking suspicion he is chairman of the board and in head-to-head play would have beaten anyone” (B.W. Malpass, *Bluff Your Way in Chess*). Actually, now Fischer’s highest rating of 2785 has been surpassed by eight players (Garry Kasparov, Veselin Topalov, Magnus Carlsen, Vladimir Kramnik, Vishy Anand, Alexander Morozevich, Vassily Ivanchuk, and Levon Aronian). “Comparing Fischer to Kasparov is like comparing a lone warrior armed only with his wits to the pampered general of an army” (Anthony Saidy, *Rank & File*, March–April 2008). “Perhaps only the young Alekhine of the mid-1920’s and early 30’s had sufficient power to equal the Fischer of the early 1970’s” (Frank Brady, *Profile of a Prodigy*).

Ree asked Fischer about the infamous story of how (first official world champion) Steinitz believed he could give odds (e.g. pawn and/or move) to God. Fischer replied that no one could give odds to the Almighty. He added: “But with White, I should be able to draw against Him. I play 1 e4 and if we have a Ruy (Lopez), the position would be balanced. I could never lose.” Then Fischer became concerned—“what if god played 1 ... c5?” But he soon brightened up. “No, no, then I play [6]Bc4 and I’m better. So, what can He do?” (Andy Soltis, *Bobby Fischer Rediscovered*)

Soon after Fischer’s arrival in New York he was invited to pay a visit to... one of the city jails. Strangely enough, the new champion agreed and even conducted a simultaneous game on many boards... One incident made



many people laugh. When Fischer approached one of the boards, his surprise knew no limits: one of his pieces has disappeared! “Where is my rook?” asked Fischer. “What rook?” asked the prisoner pretending to be taken by surprise. “Here, on c2 was my rook!” exclaimed the World Champion. Finally, the rook was retrieved from an inmate’s pocket and returned to the board. That didn’t calm down the Champion. Continuing the session, he kept muttering: “It’s outrageous! How is that possible? He simply stole my rook! I’ll write to the President! He’ll get an additional sentence!” (Eduard Gufeld, *Bobby Fischer from chess genius to legend*)

## ***ANATOLY KARPOV (1951–)***

*World Champion (1975–1985, 1993–1999)*

At the age of nine, Anatoly Karpov, was a first category player. By 11, he was a candidate master. As a young teenager, he studied chess by correspondence and traveled to Moscow to receive personal coaching from Botvinnik on school holidays. At 15, he became a national master (one of the youngest ever to gain the title). He won the World Junior Championship at 18 in 1969. He advanced rapidly and became the official challenger for the world title in 1975. He became a grandmaster at the age of 19. He became the World Champion by default when Bobby Fischer refused to play the match (because of conditions set forth by FIDE).

He was one of the most successful tournament players of all time. Not since Alekhine, had a World Champion proved his supremacy so convincingly by his tournament record. He was the highest or second highest ranked player in the world for almost 25 years. As well as, he is the only player to have a plus score against Kasparov.

Petrosian also had a brigade: Geller, Suetin, and Averbakh. However,

Karpov took it further. He is the smartest of chess players, the most organized, like an A-student, who analyzes everything and picks out the best. He did not just choose the best analysts, but strengthened his team with a cook and a masseur. He acted like a skilled manager. Karpov brought many innovations to chess. He has always been a smart kid. (Anatoly Bykhovsky, [Chesscafe.com](http://Chesscafe.com))

During his first reign, he successfully defended his title twice against Victor Korchnoi and with the 48-game unfinished match (the match was stopped by FIDE) against Garry Kasparov.

A positional player, he can find possibilities in a position that would go unnoticed by almost any other player. “Possessing a unique positional style, Karpov always seems to have his pieces well defended and makes use of a space advantage better than anyone else in history” (Yasser Seirawan, *Winning Chess Strategies*).

Like Fischer, he specialized in a smaller number of systems, but knew them deeply. “A few players (most notably Karpov, and to a lesser extent, Kramnik) specialize in a small set of systems and count upon their in-depth knowledge to make up for their predictability” (John Watson, *Secrets of Modern Chess Strategy*).

He has a reputation as being a squeeze player, or a Boa Constrictor. He subtly squeezes the life out of the opponent’s position. One square controlled here, one square taken away from any enemy piece there, and gradually the opponent is in the grips of his stranglehold. Rather than enter into a street fight for the initiative, his play is primarily aimed at eliminating his opponent’s options. All he needs to get a decisive advantage is a positional plus of almost any kind. While his opponent is starting to fade from his smothering grip, he devises a secondary plan designed to exploit the opponent’s predicament.

Every strong player has his own idea about the most important factor of

playing strength. For me this was always associated with the ability imperceptibly, move by move, to outplay the opponent. In this respect, many of Karpov's outwardly unstriking games are remarkable. (Alekseï Suétin, *Three Steps to Chess Mastery*)

Often, it is not clear where his opponent went wrong because the process was slowly spread out over the whole game. His opponents frequently crack under the psychological pressure.

When a game is won, it's usually because of an evident error on the part of the loser. In the normal course of events, you realize while you're playing when and where it was made, regardless of whether you are on the winning or on the losing side. I know one player to whom this does not seem to apply: Karpov. During the post-mortems or in written annotations to his games it usually remains obscure where his opponent went wrong, the idea being that he is slowly smothered by Karpov's assassinative play. (Jan Tim-man, *Power Chess with Pieces*)

One of his techniques is to control his opponent from the other side of the board with subtle maneuvers.

The Karpov style: a unique ability to control a game from a distance. It reminded me of a British Champion boxer who was renowned for keeping his arms at his side during a bout: his speed of reaction and anticipation was such that if his opponent tried to land a punch he would always manage to raise his guard in time to block it. Meanwhile the opponent would huff and puff trying to land a decisive punch until he had exhausted himself, after which he became easy prey. (Neil McDonald, *The Giants of Strategy*)

Karpov is a master of prophylaxis, as was Petrosian, but Petrosian's use

was defensive, whereas Karpov's use of prophylaxis is for removing the opponent's possibilities, so his own strategies can be realized without resistance. "This is typical of Karpov, who in almost every game was able to find an arrangement of his pieces which would enable him to restrict the opponent's possibilities and at the same time unhurriedly strengthen his own position" (Garry Kasparov, *My Great Predecessors*, Part V).

He has a vast reserve of patience. He likes to maneuver his pieces without forcing the issue (just nibbling away at the opponent's position until it collapses). His philosophy is that the stronger player will prevail in a protracted maneuvering game. He does not close the center automatically, as Petrosian did. Karpov generally keeps the position open but fixed. He believes that a position does not have to be sharp to contain winning chances.

Like Capablanca, Karpov usually seemed to eliminate any possible counterplay by his opponents. He is a solid player who rarely takes risks. He just aims to improve his position with each move.

For me chess is principally a fight. You have to beat the opponent and I aim for this in every game. Sometimes I am criticized for being dry, rational, calculating. Yes, I am pragmatic and my play is based mostly on technique. I try to play 'correct' chess and never take risks in the way that, say, Larsen does. With white, I try for an advantage from the first few moves, with black I try first of all to equalize the position. When making my choice of moves it is not the case that I try to hit upon the simplest, but rather the most appropriate move. If there are several moves of approximately equal worth then the choice depends a lot on who is my opponent. For example, with Korchnoi and Tal I prefer to go for simple positions which do not suit their creative tastes, while with Petrosian I try to complicate it a bit. However, if I see there is a single good line, then no matter who my opponent is I go along that one line. (Anatoly Karpov, *Karpov's Collected Games*, David Levy)

Any great champion must be well rounded, and Karpov is no exception. His attacking powers are also excellent. The fact that he has won over twenty brilliancy prizes is testimony that he is capable of exciting chess. He does not initiate a battle, though, until he is sure that his strategy will win. Based on a profound understanding of the position, and when the situation is right, he can attack fiercely and soundly (complete with any sacrifices and tactics that might be necessary). “The interesting thing about Karpov’s games is that they are often ‘strategic attacking games’—lengthy offensives full of adroit maneuverings aimed at strengthening the attack” (Jan Timman, *On the Attack!!*).

In reality, Karpov plays beautiful chess. Looking at the five-year period before the first edition of this book (1990–95), in your authors’ opinion he played a higher number of aesthetic games than any other player! There are a couple of reasons why; firstly, there is a correlation between beauty and truth in chess, which, more simply, means that strong moves are often beautiful. Secondly, the only player demonstrably stronger than Karpov during this time, Garry Kasparov, played far fewer games over the same period. (Jonathan Levitt & David Friedgood, *Secrets of Spectacular Chess*)

His tactics are not usually focused on a direct attack on the king, but used as a way to limit counterplay or to gain an advantage. Even though he is capable of a wild tactical attack, he will generally choose to win in a more subtle, slower, surer way.

Vladimir Kramnik said the only one who managed to violate Steinitz’s law (The player with the advantage must attack) successfully was Anatoly Karpov. Karpov didn’t always attack when his position improved; he found other ways to enhance his chances, Kramnik said on [e3e5.com](http://e3e5.com). “In my opinion, there were no players before or after him who were able to do this,” he added. (Andrew Soltis, *The Wisest Things Ever Said About Chess*)

He is a great defender. He is probably at his best when he has an inferior position and he is seriously threatened.

It is typical of Karpov's play, and one of his strong trumps, that in positions where he can get the worst of it or already stands clearly worse, he continues indefatigably, neither permitting a further worsening of his position nor losing sight of his possible winning chances. This is part of the profile of a real fighter at the highest level. (Jan Timman, *The Art of Chess Analysis*)

He is one of the best endgame geniuses of all time. He plays the endgame with the same precision of his idol, Capablanca. Even Kasparov admitted, before their first title match, that Karpov was a better endgame technician than he was.

Alekhine always played the endgame very concretely, backed up by his great tactical vision, while Capablanca maneuvered more, creating practical problems for the opponent. Karpov is a player who seems to have taken the Capablanca road, while Kasparov goes Alekhine's way. (Jacob Aagaard, *Excelling at Technical Chess*)

Karpov had this to say about studying his hero, Capablanca:

To me the player from the past who I wish to turn to again is Capablanca. I know all of his games, but this was done a long time ago, as it was from his book that I taught myself to play chess, and I have returned to isolated games. Now I want to trace all his life and creative paths, understand the broad principles and consequences of his ideas and opinions. (Anatoly Karpov, *Anatoly Karpov's Games as World Champion 1975-77*, Kevin O'Connell & David Levy)

Karpov believes in keeping healthy. He once said, “To be a world champion you can’t simply be a strong player. You have got to be a strong human being!” (Anatoly Karpov, *Best Games of the Young Grandmasters*, Craig Pritchett & danny kopec). Karpov’s psychological play is also strong.

“Psychological appraisal” of the position. I am afraid that many people, grandmasters included, may not be familiar with this expression. Far from all grandmasters possess this quality. It is not the actual appraisal of a position, but a reflection of your opponent’s concept of the position. The ability to understand your opponent’s train of thought means a great deal. It means cutting the analysis of your opponent’s possibilities by roughly a half, examining only what your opponent considers to be most unpleasant for you or for himself. It means foreseeing what your opponent will do. Karpov possesses this quality more than other grandmasters. (Victor Korchnoi & Lenny Cavallaro, *Persona Non Grata*)

“In an article on classicism, romanticism and hyper-modernism in chess, Golombek wrote that Karpov was something of everything, played bits of all styles and was perhaps in the process of forging a new style—the Karpov school” (Jeremy James & Leonard Barden, *The Master Game*).

## **VICTOR KORCHNOI (1931–)**

*World Champion Challenger (1978, 1981)*

Victor Korchnoi is probably the best player in history not to become the World Champion. He was in the Soviet Championships 16 times from 1952 to 1973 (winning it four times). He played for the USSR in three World Chess Team Championships. He was in all of the World Championship Candidates tournaments from 1962 to 1977. He has won many major tournaments (including 20 international tournaments) that included the strongest players in

the world. He has played at least eight World Championships on an equal footing and he has played strongly in two matches for the World Championship. He has been one of the top players in the world for over five decades. He has made many contributions to chess theory. He was still among the top 100 players in the world at the age of 75 and, in terms of sustained strength over time; he is one of the top five or ten players of all time.

Korchnoi is a fierce fighter. His will to win is legendary. His stubbornness, enthusiasm, and readiness for a fight are well known. He has a high percentage of decisive games and rarely do his games end in short draws. Mark Dvoretsky said that, of the contemporary players, Korchnoi comes the closest to the fighting character of Lasker.

GM Korchnoi is one of the great fighters of all time, with one of his characteristics being that periodically in strategically rather clear positions he chooses unconventional moves/plans to unbalance the position so radically that his opponent is thrown for a loop. (Edmar Mednis, *Strategic Chess*)

In 1998, Korchnoi scolded some young grandmasters for their lack of fighting spirit. Genna Sosonko tells the story in his preface to Korchnoi's book:

At the tournament in the Dutch town of Tilburg in 1998, Korchnoi reprimanded some young grandmasters: 'Why didn't you play on in this position? You had chances. Dangerous? Then you'd be better not playing chess at all, if you find it dangerous...' 'And you, aren't you ashamed of agreeing to a draw after half an hour with White against Anand? Isn't it interesting—to play Anand? Is it every day that you have a chance to play Anand? Yesterday against Kramnik I too could have taken on d5 in the Slav and would definitely not have lost, but I don't play that way, and I never will play that way, if I think there is a variation that leads to an



advantage. Even if the position turns out to be dangerous and complicated. After all, it is dangerous for both players... (Genna Sosonko, *Victor Korchnoi: My Best Games, Vol. 1*, Victor Korchnoi)

Korchnoi has a high success rate with black. He plays aggressively as black and goes all out to win. He is possibly the best player in history with the black pieces (Fischer and Larsen coming in second and third).

He is a tough defender and a strong counterattacker. He likes to tempt his opponents into a premature attack by letting them have a little initiative so they will get careless.

The daredevil counterattacker of our time is unquestionably Viktor Korchnoi. He loves to provoke his opponents into attacking him, usually by making seemingly careless moves. Like all counterattackers, Korchnoi is a great defender. If he weren't, he'd never get a chance to counterattack. I was amazed at the kind of attack he was willing to endure against me at Stockholm 1961, and further amazed that he survived. (Pal Benko, *Winning with Chess Psychology*)

He is always looking for the best move, trying to find more in the position. As a result, he gets into time-trouble frequently. Even so, being a strong blitz player, he is still usually able to keep control of the position. Of course, there has been a good share of time-trouble blunders too.

Almost every opponent of Viktor Korchnoi knows that it is a mistake to get him mad. The more angry he gets, the better he plays. If you are his friend, your game is half won. There is a theory that Korchnoi cannot play well against Kasparov; that he simply refuses to destroy the man he helped become world champion. Korchnoi won a world championship candidates' match by forfeit when Kasparov failed to appear in Pasadena in 1983, but he agreed to play the match later, in London. What would

have happened to the young man had Korchnoi refused? (Lubomir Kaválek, *World Cup Chess*)

At about the age of 30, he became discontented with his style of play, from a creative point of view. He spent ten years relearning the game from the ground up. This kind of fortitude may well account for his strength, not only subsequently, but also at his advanced age today. He continues to play with the energy, imagination, love of the game and endurance of some of the top players in the world at half of his age. At the age of 75, he entered the Senior World Championship for the first time and won it.

He is also famous for his honest analysis and annotations. He is objective about both his opponent's moves and his own. He has produced a lot of influential theoretical work.

He is known for being material-oriented. He is often a pawn-grabber. He is willing to go through a lot of agony, even let his position become critical, just for a pawn. Not surprisingly, he is also one of the best specialists in converting a material advantage into a win. Korchnoi says that his reputation of being a pawn-grabbing materialist may have been true before his reformation at the age of 30, but he now attempts to get the initiative whenever possible.

To play at the level he has, he would have to possess a universal style, and he does. He is a complete master of the tactical and positional aspects of the game. He believes his tactical strength is a little stronger.

He creates original long and short-term strategies and has a high level of technique. "As for me, I am a practical player, and what attracts me in chess are not the rules, but exceptions to them, which, fortunately, occur very often" (Victor Korchnoi, *Practical Rook Endings*).

An interesting story about Korchnoi takes place in the early 1970's: Korchnoi was driving a car in Leningrad. At the same time, he was also deep in thought about a chess game. Distracted by his thoughts, he rear-ended a police car. Because of this incident, he decided to give up driving!

At over seventy years of age, he is still active on the chess scene. His international rating in January 2000 was 2659, which placed him seventh in the world list. Thanks to his chess ability and achievements, his deep and devoted love of the game, and his mild and modest personality, Korchnoi is still a respected player in the chess world. (Liu Wenzhe, *Chinese School of Chess*)

## **GARRY KASPAROV (1963–)**

*World Champion (1985–1993, 1993–1998, 1998–1999)*

Quite possibly the greatest chess player of all time, Garry Kasparov was the first person to pass up Fischer's record high ELO rating of 2785 and the first person to reach the 2800 mark. At 22, he became the youngest World Champion in history.

He was an extraordinary player as a child. At the age of six (and without even having been taught how to play), after solving an endgame puzzle that stumped his parents, he was taken to the chess camp "Young Pioneers Palace." At the age of ten, based on his talent, he was invited to enter the Botvinnik Chess School. There, Botvinnik himself took a personal interest in him. He said that Kasparov was the future of chess. His raw talent was nurtured under just the right conditions at the school.

Kasparov came along at a time when computers could be used as an aid for preparation. The combination of the talent, the school, and computer-aided preparation all came together to produce one of the greatest players of all time.

At the age of 12, he became the youngest ever to win the USSR junior championship. In 1979, while untitled and still without even an international rating, he destroyed a world-class field in Banja Luka. In 1980, he won the World Junior Championship.

He had the highest rating in the world for almost 20 years. Many people consider him to have been the best player of all time. Almost everybody agrees that he is certainly one of the best players of all time. That select group would probably be made up of Kasparov, Fischer, Morphy, Alekhine and Capablanca.

In 1993, he formed the Professional Chess Association and his crown was declared forfeited by FIDE; otherwise, Kasparov's reign would have been from 1985 to 2000.

It is hard to think of Kasparov without thinking of Karpov. The two archrivals played five matches against each other. Those matches are arguably the greatest in the history of chess.

In February of 1988 World Champion Garry Kasparov challenged the six top U.S. junior players to a simultaneous match. We thought that we could win, but he turned out to be almost as tough six on one as he would be one on one! In the end, of the six juniors, we scored three losses, two draws, and one win. (Patrick Wolff, *Wolff!*)

He thrives in complicated positions. His fondness for complicated positions leads to a lot of risk. He excels in positions that are too complicated for either side to comprehend fully.

Kasparov has played many games with brain-busting complications—but only when the situation on the board demanded it. If he can win without giving his opponent the slightest counterplay he will always choose that option, even if it takes longer. (Neil McDonald, *Mastering Chess Tactics*)

His hero was Alekhine, to whom he bears a strong similarity in style. He has a dynamic, sacrificial and innovative style. In a worse position, he prefers a questionable piece sacrifice (leading to complications) over a difficult defense. He is a master of the speculative sacrifice. He often sacrifices a pawn to get his rooks into play or sacrifices material for an attack. His sacrifices tend to be

sounder than Tal's were.

He seems to be more of a calculator than an intuitive player. Although, he believes that the opposite is true. He is, like Tal, one of the fastest, most accurate, calculators the game has ever seen.

Kasparov was also able to baffle me in post mortems with the amazing and exceptionally deep things he had seen. Kramnik is more or less his equal in that respect: both players calculate very deeply into relevant lines which are not easy to fathom. (Jan Timman, *On the Attack!!*)

He has an extraordinary memory.

To make a rather primitive classification, the average grandmaster knows about 1,500–2,000 typical positions, including the opening, possible middlegame plans, and some outlines of endgame. Super GMs, like Kramnik or Anand, have a wider and deeper knowledge. As for Kasparov, his knowledge is truly head-spinning, I guess, his number of positions might exceed 10,000. Garry's memory is phenomenal! (Valeri Tsaturian, [Chesssafe.com](http://Chesssafe.com))

His basic style is that of sharp tactical aggression. He is considered one of the top tactical geniuses of all time. He is capable of all traps and swindles.

Kasparov's fundamental style is aggressive, centered on sharp tactics and grandly conceived attacks, an elaborate network of stratagems, shots, swindles, traps, pitfalls, schemes and threats to gain material or produce checkmate. It's a style that, in general, has brought Kasparov victory, though it involves tremendous risk. (Bruce Pandolfini, *Kasparov's Winning Chess Tactics*)

His attacks are often doubled-edged, just a slip away from catastrophe. He

is often under attack himself when he is attacking. His attacks are imaginative and vicious. They are usually more complex than were those of Fischer.

Kasparov has a very aggressive style, and is often willing to invest material for an attack or other positional compensation. Unlike Tal, his attacks are not mostly aimed at the enemy king. Instead, Kasparov fights hard, perhaps without parallel, to seize the initiative. Then he will target weaknesses in the enemy position, wherever they can be found. After tying down the enemy forces to the defense of the weak area, Kasparov then launches the attack against the enemy king. (Eric Schiller, *Killer Chess Tactics*)

True to his Soviet School, he is a dynamic player. The initiative is king. His ability to seize the initiative is legendary. He is especially adept at achieving positions in which the initiative never dissolves.

He is known for his enormous opening preparation. “Kasparov is the absolute master of preparation. He has shown on numerous occasions that it’s particularly dangerous to repeat a line against him” (Graham Burgess, Dr. John Nunn & John Emms, *The Mammoth Book of the World’s Greatest Chess Games*).

He is well versed in e4, d4, and c4 as white and is familiar with many defenses as black. He had a career percentage of about 80% with white. It is also amazing how well he has performed with the black pieces, even against the world’s best players.

He has a strong personality and has an enormous capacity for work. “Kasparov’s playing style is that of a self-confident genius, who combines the solidity and tenacious defense of Karpov with the fiery brilliance of Tal” (Raymond Keene, *Battle of the Titans*). “You may like the guy or not, but as a chess player he is really God” (Veselin Topalov, *New In Chess*, 2005/8).

Like former champion Bobby Fischer, Kasparov has little time or patience

for social niceties. He likes to slam his piece down on the chess board when he makes a strong move, sometimes scattering his opponent's pieces. His way with enemies is brutal and direct, in life even more than across the board, and he is inclined to consider most people his enemies until they prove themselves to be otherwise. (Lubomir Kaválek, *World Cup Chess*)

A recent (1983) interview Kasparov gave after the conclusion of his Candidates' Match with Belyaevsky. When asked the standard question asked of all young chess stars, "Who are your heroes?" Garry did not respond "Karpov" or "Alekhine," or even his mentor "Botvinnik." Instead, after a moment's thought, he said (roughly) "Of course, one may learn about endgames from Andersson, about how to improve the position of one's pieces from Karpov—in short, one can learn something from almost anybody. But as for heroes—well, this might sound immodest, but I don't really think I need a hero any more; I've gone beyond that." (James Marfia and John Watson, *1983 U.S. Open Championship*)

In one of his rather modest moments, Kasparov said, "It is quite natural that somebody will be extremely strong among so many players devoting their free time to chess in a big country. It just happened to be me" (Garry Kasparov, *Best Games of the Young Grandmasters*, D. Brine Pritchett & Danny Kopec).

Kasparov plays such awesome and yet error-free chess that there has been speculation that he might be a chess-robot with an intergalactic Elo, sent by advanced aliens to inculcate a little humility into Earthlings. This is clearly ridiculous as no advanced life-form would ever make a robot that hairy. (B.W. Malpass, *Bluff Your Way in Chess*)

## **VESELIN TOPALOV (1975–)**

### *World Champion (2005–2006)*

Veselin Topalov was born in Rousse, Bulgaria. At 14, he won the 14-year-olds World Championship in Puerto Rico. As a GM in 1992, at the age of 17, he moved to Spain. He was ranked in the top 20 players in the world within 18 months. In 1994 at the Moscow Chess Olympiad, on the first board of the Bulgarian team, he led his team to fourth place. In 1996, at 21, he was the most successful tournament player in the world.

From the mid 1990's he has been a super-GM. In 2005, an eight-player double-round tournament was held for the FIDE World Championship. The tournament included all of the likely candidates for the title (the others were Anand, Morozevich, Leko, Judit Polgar, Kasimdzhanov, Svidler, and Adams). Topalov finished the first round with a crushing score of  $6\frac{1}{2}/7$ . Then, he cruised through the second half with draws. Topalov was unbeaten and won the tournament convincingly. In 2005, he also won the Chess Oscar. In 2006, he became the third person in history to break the 2800 rating mark (Kasparov and Kramnik being the first two).

His rating of 2813 is the second highest rating in history (Kasparov having the highest). A reunification match took place in 2006 with PCA champion, Vladimir Kramnik. He lost the title by one point in that match. In 2008, he became the highest rated player in the world and passed the 2800 ratings mark for the second time. As of March 2010, his 2805 rating is second only to the 8-point higher rated Magnus Carlsen. As of the writing of this book, he will be challenging Vishy Anand later this year (2010) for the World title.

There are players rated a hundred points lower about whom we know much more. What does the chess world really know about Topalov? Nothing much, to put it bluntly. His interviews shed little light: he clearly doesn't want to open his soul. His answers are rarely out of the ordinary, no special assessments, no delicate analysis or an extraordinary variation



that was seen only by him. No illnesses, no bad moods, no depressions. After winning the World Championship he calmly told the camera: “This is the happiest day of my life”—some players speak of a single victory with more emotion. (Alik Gershon & Igor Nor, *San Luis* 2005)

He is an aggressive player, one of the most aggressive of today’s top players. He will take risks and does not seem to fear losing. “I am not afraid to lose—this makes the difference between me and the others” (Veselin Topalov, *Chess Life*, December 2005).

Every move seems to be forceful. He creates a lot of tension on the board and aims for dynamic play. He is dangerous with the initiative and is willing to invest material in order to gain it. He is an extremely strong tactical player and rarely misses a tactical opportunity. He likes to (and is able to) create sharp play, even in quiet positions. His games are always interesting.

He is a fighter. He will fight to the end. He has tremendous concentration levels during the game.

Indeed, the chess Topalov is playing is a modern one and is of a typically 21<sup>st</sup> century approach. He is well aware that without taking risks you cannot succeed in an extremely strong field. He bravely undertakes open game and often takes chances. He plays unbiasedly in all stages of the game, and makes the best of the possibilities presenting themselves with a brilliant technique. He is not unbeatable, but is able to beat anyone in today’s leading group. Even after serious losses, he quickly finds his legs, playing the next game already with all his strength. (Daniel Lovas, *The Chess Greats of the World, Topalov*)

He is always well prepared. His opening preparation was so high that it forced all the other top players to match his level of preparation in order to compete with him. His opening novelties are not designed for a quick

knockout, but are always geared towards a good fight. He also has great technical ability but, according to Kramnik, he often tends to play the endgame the same way he plays the middlegame, too actively.

Away from the chess board, Topalov is an affable and polite young man, who is always willing to hand out autographs to his fans and generously finds time to speak to the press. However, whenever he sits down to play a game of chess he turns into a predator... (Dirk Jan ten Geuzendam, *New In Chess*, 2007/4)

## **VLADIMIR KRAMNIK (1975–)**

*World Champion (2000–2004, 2004–2007)*

In the year 2000, Vladimir Kramnik defeated Garry Kasparov, 8 ½ -6 ½ to become the 14<sup>th</sup> World Chess Champion. Kasparov did not win a single game against Kramnik in that match. He then defeated FIDE World Champion, Veselin Topalov, in 2006 to become the first unified World Champion since 1993 (when the PCA split from FIDE). He defended his title in 2007 by winning a double round robin tournament comprised of himself, Anand, Morozevich, Leko, Aronian, Gelfand, Grischuk, and Svidler.

At one time during the 1990's he played 76 games without a loss. He has never lost an Olympiad game.

He is a big advocate of the bishop pair. "Kramnik is perhaps the greatest exponent of the two bishops who has ever lived" (Neil McDonald, *The Giants of Strategy*).

He can play tactically, and has won some great attacking games against Kasparov and Topalov, but he is known primarily as a positional player. Generally, his tactics are more of a long-term positional type. He tries to get the advantage and he will nurture an advantage to a win without much risk.

His safe style produces many draws. He also has quite a few short draws. As a result, he is often referred to as “Drawnik.” “In general I like games where one opponent slowly outplays the other. This is very much my style of chess. I understand that people may find it boring, but I still enjoy it” (Vladimir Kramnik, *New In Chess*, 2006/8).

His endgame technique is fantastic. He is always content to exchange queens and go into the endgame, even if he is a little worse. By far, most of his games are decided in the endgame.

He characteristically aims for a space advantage (even if it means taking risks); he then eliminates any possibilities of counterplay from his opponent. He gains the initiative and applies unremitting pressure to his opponent’s pawn structure until it cracks. Then, he is often able to get a passed pawn, which, because of his great endgame technique, leads to a won game. Despite his positional maneuvering abilities, he rarely plays a blockade game.

People tend to call me a match player, rather than a tournament player. However, I don’t think they get the point. I am a player capable of focusing all his effort at the proper time. I admit I may be a bit lazy. I am not Kasparov—sometimes I lack energy or motivation, call it whatever you like, but I am not always able to give 100% in every tournament. What I can do is concentrate at critical moments, and it brings its rewards. (Vladimir Kramnik, [Chesscafe.com](http://Chesscafe.com))

## **VISWANATHAN ANAND (1969–)**

*World Champion (2000–2002, 2008–)*

Vishy Anand is clearly one of the great talents in chess history. He won the Asian Junior Championship in 1984. In 1987, he was the first Asian to win the World Junior Chess Championship and, that same year, the first Indian to

achieve a 2500 rating. He was also the first Indian grandmaster and the youngest GM in the world at that time. Called the “Tiger from India” or “the Tiger from Madras,” he went on winning major tournaments, matches and just about every title offered (including World Championship titles in blitz chess) to become the FIDE World Champion, in 2000, by beating Alexei Shirov 3 ½ - ½ in the final match. In 2008, he became the 15<sup>th</sup> World Champion (and the Undisputed World Champion) by beating Vladimir Kramnik 6½ - 4½.

He is essentially a classical player. He is known for his quick and deep calculating abilities, his maneuvering, attacking and tactical skills. In defense, he prefers active counterplay. His play has been characterized as “efficient” and he has remarkable intuition.

Like Capablanca, he is a natural player and a quick thinker. He makes difficult decisions effortlessly. “Anand is a truly awesome player—the speed which he can calculate variations is simply staggering. This ability, combined with wonderful intuition and a photographic memory, makes him one of the most feared opponents in the world” (Julian Hodgson, *Attack*).

His quick calculating ability and his rapid assessment of a position make him an excellent blitz player (which he is). He is one of the top blitz players in the world, winning (among several others) the World Rapid Chess Championship in 2003, the 2003 Rapid Chess Classic, the 2006 Grenkeleasing World Rapid Championship, the 2006 Mikhail Tal Memorial Blitz Tournament, and the 2007 and 2008 World Rapid Championships.

He seems to like to play attacking games. In every attacking position, concrete calculation is of prime importance. I have often watched how, seemingly without exerting himself, he launched an attack and then maneuvered his way to a stylish and successful finale. Anand plays strategic games and direct attacking games with the same ease. Once he has secured the initiative, his attacks often seem to run themselves. (Jan Timman, *on the Attack!!*)

He is prepared to go for a win with either color. He is a strong tactical player and hardly ever misses a tactical shot. “Vishy seldom misses a tactic” (John Fedorowicz, *On Top of the Chess World*)

# 6



## ***Tournaments***

*You must play in tournaments*

*(1) to retain your competitive sharpness,*

*(2) to keep retesting your mettle and*

*(3) to try to apply the chess wisdom gained in the study program.*

**—Edmar Mednis, *How to be a Complete Tournament Player***

## **PREPARATION**

**SIGNIFICANCE:** “We Soviet players, following the example of World Champion Botvinnik, place great significance on advance preparation for a tournament in general, and each game in particular” (Rashid Nezhmetdinov, *Nezhmetdinov’s Best Games of Chess*).

**PRACTICE COMBINATIONS:** Solving tactics and combinations puzzles regularly in the weeks or a month or so before the tournament is helpful. It will help your form. You will not only develop your ability, but your confidence will increase as well.

**MORE TOURNAMENTS:** One of the best forms of tournament preparation is to compete in actual tournaments as much as possible. By playing under tournament conditions and facing players of varying strengths, you will preserve your competitive edge and have the opportunity to test the knowledge you have gained. “Botvinnik wrote that a chess player should play

70 games a year, thus I follow his advice” (Sergey Ivanov, [Chesscafe.com](http://Chesscafe.com)).

**REST:** Botvinnik recommended that you entirely discontinue all chess activities about five days before the tournament. This kind of rest is good for the mind and body. The same general idea is common in competitive sports. In sports, it is referred to as “tapering.” During the tournament, do not tire yourself out between rounds by preparing for the round, playing blitz, or socializing. **It is better to be fresh and relaxed for the tournament game.**

**THEORETICAL:** Have your openings ready for the tournament. You should spend some time polishing up on your opening repertoire.

**FOCUS:** Studies have shown that focusing on results seems to diminish performance. In other words, being overly concerned about how well you should do in a tournament, can detract from how well you actually play. In preparation for a tournament, it is a good idea to focus on the game itself rather than the possible prizes.

**TRAINING GAMES:** In order to avoid being mentally stale, some top coaches believe that you should not only study chess, but also **mix in some tough training games**. The stresses experienced in these games can help prepare you for the competition. Even some speed chess should help.

## **WALKING DURING GAME**

Constantly leaving the board can interfere with your concentration and lower the depth of your game, but some walking can be helpful. Some fresh air and a little movement can help you focus. Physically, it is not good to remain relatively motionless for hours on end. Some players use the walks not only for exercise, stress-relief and for visiting the restroom, but for considering positional factors and general principles. Not many (if any) experts recommend an extensive amount of walking, though.

## EXERCISE

It is beneficial for a chess player to be in good physical condition. Studies have shown that, in a game of chess, players often achieve higher levels of stress, heart rates, and other physiological states than do athletes in many conventional sports. By being in good physical condition, the player will be better able to hold up to the pressures of the game. “During tournaments, I find that I play better if I can swim for an hour or so each day. My performance rating is generally about 100 points higher, in fact!” (Eric Schiller, *Encyclopedia of Chess Wisdom*).

In order to have solid nerves and stamina, you need to be in shape. Botvinnik walked for an hour each day during tournaments. Euwe practiced boxing, tennis, gymnastics and swimming when he was preparing for the match with Alekhine. Fischer said that health was one of the most important assets for success in chess. He prepared for some of his matches by lifting weights, hitting the heavy bag, playing tennis and swimming. Garry Kasparov also lifted weights and trained by doing some boxing, swimming and rowing. “Peter Svidler astutely remarked that two elements—theoretical preparation and physical fitness—were becoming increasingly important in modern chess” (Alik Gershon & Igor Nor, *San Luis 2005*).

The advantage between two players of equal strength should go to the player with the greater physical conditioning and resilience. Aerobics improves the oxygen levels in the bloodstream, which in turn benefits the brain. If you want to improve in chess, fitness is important. However, if exercise is something you cannot bear the thought of, at least be as good to your health as you can. Try to improve your diet and hygiene. Try to get enough sleep, stop smoking, and do not abuse alcohol. Anything you can do to benefit your health is bound to help your game. Even your appearance can have some effect on your self-confidence, which, in turn, can help your game.



## PLAYING HIGHER-RATED PLAYERS

In order to improve, you must play stronger players. **Higher-rated players are more likely to recognize and punish your mistakes. When the mistakes are punished, you learn.** This is one of the best ways to see your errors and misunderstandings about the game. The trick is to learn from these mistakes and to try not to repeat them.

**NORMAL:** One school of thought is that you should generally play your natural, normal, game. **You should not change openings because the opponent is higher-rated** or is better prepared. **“If you think your openings are good, play them against anyone, especially grandmasters!”** (Alex Yermolinsky, *The Road to Chess Improvement*).

Against stronger opponents, aim for the opening and middlegame positions with which you are familiar. Play the style with which you are comfortable.

Do not have a defeatist attitude or play defensively out of lack of confidence. To the weaker player, the stronger player's moves often look stronger than they are. A common error made when playing stronger opponents is to concentrate too much on short-range tactics out of fear of a stroke of brilliancy from your opponent. This can cause time-trouble as well as the loss of focus on a long-range plan. Play to win or draw, but do not expect defeat. “Walter Browne once said that the most dangerous player was an A-player without fear” (Pete Tamburro, *Chess Life*, December 2007). If you are a tactical player, play tactically. If you are a positional player, play positionally.

Against stronger players, you have to stay alert. Play good chess. Get good piece activity, a good pawn structure, space... challenge his strong pieces. Play the board; forget about the rating. An exception, though, might be that you might decide to force a draw against a higher-rated player when, against a lower-rated player, you might decide to go for the win.

**COMPLICATE:** Another theory is that when playing a stronger player you might do well if the position is so complicated that it is above your opponent's comprehension (as well as your own), especially if you are the attacker. The idea is that, if the game is up for grabs and is a matter of luck, you might be the lucky one. Complicating the game should favor the stronger player, but the chances of a mistake by him are greater than in simple, technical, positions. "By increasing the randomness of the result you are giving yourself more chance of a 'lucky' win or draw" (Simon Webb, *Chess for Tigers*).

Against a stronger player, a draw is usually an acceptable outcome. Therefore, you can sometimes enter into complicated combinations that have some kind of a safety net or a bailout to them. When you get to the bailout move (or the point of no return), you will be deeper into the combination, so you should have a better idea of its likelihood of success before you totally commit to it.

The stronger player has more to lose than you do, so he is less likely to take chances. He usually wants a clear, technical, safe win. As a result, he might decline an unclear sacrifice, or avoid sharp continuations. By unbalancing the position (and mixing it up), you might also gain a psychological advantage that can lead to his making a mistake. You can start by playing an aggressive attacking opening.

**EQUALITY:** The third theory of how to play the stronger player is to play it safe; try to avoid creating weaknesses, defend all of his attempts to gain the advantage. The idea being that, if faced with a draw against a lower-rated player, he might get a little overly optimistic and play an inferior line or over-extend himself (trying too hard to win) and leave himself vulnerable. Strong players tend to avoid simplification in balanced positions against weaker players.

Possibly the choice of which method to use against the stronger player can be based on styles. If you know his style, you can choose the approach that

may work best against his style.

**ACTIVITY:** No matter what approach you use against the stronger player, passivity is not good. You must remain active. You cannot give him control.

**CALM:** If you do get the advantage against the higher-rated player, do not blow it by getting overly excited. Calm down and check your moves carefully as you continue. Getting too excited is what often causes the loss of an advantage against the stronger player.

## PLAYING LOWER-RATED PLAYERS

**PATIENCE:** When playing a much lower-rated or weaker player, it can pay to be patient. It is not necessary to take risks. Your advantage in opening and endgame knowledge and middlegame skills should prevail. If you are patient, and play soundly, the lower-rated player is bound to make a positional mistake, or even a tactical one. The idea is to let him self-destruct. If he makes it to the endgame without a serious mistake, then you should be able to beat him there with your superior technique.

**It is often best to wait until the weaker player has made more than one mistake before trying to refute the first one.** Play soundly until you are sure you are winning before pressing the victory home. That way, you will not run the risk of simplifying the game too much and forcing the weaker player to make forced moves (which, in turn, saves him time on the clock). Pressing too hard too early can often lead to draws.

**IMBALANCES: Weaker players are more often beaten in positions with material imbalances.** They are usually less likely to know how to play positions with imbalances than stronger players are. Lower-rated players tend to blunder more often than stronger players do. Opportunities to blunder are usually more plentiful in unbalanced positions. As a result, it can be a good idea for the stronger player to create imbalances.

The safest imbalance for the stronger player is the bishop for a knight (or knight for a bishop). Therefore, it can be a good idea to go for this imbalance against a weaker player.

**EXCHANGES:** When playing a weaker player, it can be a good idea to trade off some pieces because he usually will not know which pieces to trade and which ones to keep. Weaker players are generally less competent in making correct exchanges.

**OPTIONS:** Another approach against the weaker play is to gives him plenty of opportunities to go wrong. Try to avoid simple, clear-cut, or forced lines. Get out of standard, book-type openings and positions. Give him as many choices and chances to make mistakes as possible.

If the weaker player does make a mistake, do not overdo your immediate efforts to win. Even when finishing him off it is best to avoid forced replies. This is a good time to remember the principle of two weaknesses and to provoke a second weakness before the final assault.

**ATTACK:** Still another, and not necessarily contradictory, approach is to attack. If you are stronger and attack, you should probably win. Besides, because of the ratings difference, you will probably psyche out your opponent and he will probably even panic and play below his strength because of it. “Nowadays it is almost a law that against a weaker opponent one should use sharp attacking methods” (Max Euwe, *The Development of Chess Style*).

## DRAWS

**TYPES:** There are several types of draws. There are draws that result from insufficient mating material, from level games and from stalemates. There are draws based on the rules (threefold repetition and the 50-move rule), draws from perpetual check, and there are draws by agreement.

**EVEN GAME:** If both sides play perfect chess, theoretically, the game

should remain even and end in a draw. Aside from the fact that no one is able to determine what a perfect game is, it probably will never be played. All games are a mixture of good moves and not so good moves, with mistakes of varying degrees on both sides. Sometimes, a game can be close to even all the way through. Other times a game can be dead even after both sides have made colossal mistakes that have cancelled each other out.

Lasker said that, if two players are even in strength, they both play correctly, and accurately, the games tend to be dull and frequently drawn. “It is unbelievably difficult to beat an excellent player who plays carefully and every time that the position might get out of control he forces a draw irrespective of the color of pieces” (Vladimir Kramnik, *Super Tournaments 2003*, Sergei Soloviov).

**LEARN:** While there is nothing wrong with offering or accepting a draw, **it is a good idea for a beginner to play until the end. A draw by agreement will not teach you much. Playing the game out is a good way to learn.** Fischer said that draws make for dull chess and that wins were what makes for fighting chess. Even as a top player, he used to turn down draw offers pretty much regardless of the position.

I recommend adopting Fischer’s attitude toward draws—i.e., playing every game to a finish—especially if you’re still developing as a player. **Agreeing to draws in the middlegame, equal or otherwise, deprives you of the opportunity to practice playing endgames, and the endgame is probably where you need the most practice.** The best way to improve is to get a lot of experience under competitive conditions. (Pal Benko & Burt Hochberg, *Winning with Chess Psychology*)

**DRAWN POSITION:** An equal position is not necessarily a drawn position. A position that is razor sharp can be equal, and a position that is dull, can be a winning one.

“All rook endings are drawn,” according to a common piece of chess folklore. We decided to distrust emotion and check the figures, comparing the percentages of draws in different types of endings, using a database of more than three million games. The results were very surprising. Bishop endings turned out to be the most drawish, 47%. Second place went to queen endings on 43%. Even more surprising was the third place for knight endings, at 40%. And the notorious rook endings came only second-last at 38%, with pawn endings naturally turning out to be the least drawish at 27%. (Andrei Volokitin & Vladimir Grabinsky *Perfect Your Chess*)

**DRAW OFFERS:** Whether to accept or offer a draw often depends, not only on the position on the board, but whether you or your opponent are in time-trouble, how you feel, your personal ethics, and your standing in the tournament.

**If an opponent offers you a draw, try to understand why he is offering it.** Usually, it is because he has lost his confidence in his position. Try to figure out why he has. Often, the offer of a draw means that your opponent has discovered a combination or a move that, if you play, will lose the game for him. **Never accept a draw without serious deliberation.** On the other hand, do not ponder for too long. If you decide to play on, you do not want to be in time-trouble as a result.

**If a higher-rated player offers you a draw for no particular reason, be suspicious. You probably have a “win” waiting to be discovered.** By playing on you will either win or learn something. Be careful not to succumb to a typical reaction, when coming from a lost position to a winning one, by accepting a draw out of relief.

If you turn down a draw offer, take a few minutes to compose yourself before continuing. This is to avoid the natural tendency to follow with an overly aggressive move.

**Generally, you should not offer a draw unless you are losing, you are in time-trouble, or your position is clearly worse than your opponent's.** Some consider offering a draw when you are worse to be unethical. Although, there can be times when it might be welcomed by the player with the better position (for example, if he is in severe time-trouble, unsure of how to proceed or is playing a much stronger player). In such cases, a draw might be better for him than blowing an otherwise good game.

Offering a draw when you are worse can be a good idea because your opponent is likely to consume more time considering the offer (this can be especially valuable if either of you are in time-trouble). The choice is personal. Offering a draw in a position where the draw is the likely outcome can be advantageous because your opponent will sometimes try too hard to justify refusing the offer and will take unnecessary risks.

If you have the initiative, you should not offer a draw until you have gone a few moves with the help of the initiative. That way, you will get a deeper look at the position before deciding on making the offer. If you have been ahead but then lose the advantage, your opponent (who has been struggling for equality) might be open to a draw offer, because it is sometimes difficult to make the mental adjustment to the new circumstances.

I only ever offer draws when I'm worse or losing. In general, this is good policy to stick to. There is no logical reason to offer a draw in any other circumstance as by definition you must either have an advantage or actually be winning. (Ali Mortazavi, *The Fine Art of Swindling*)

If your draw offer seems reasonable to you, and yet is declined, you should try to figure out the reason it was declined. The player who tries to understand why his offer was declined can avoid certain pitfalls:

Then he may be able to avoid the following typical psychological mistakes:

1. A subconscious desire to demonstrate quickly the justification for his offer. Hence he hastily makes the obvious move, which is by no means always the best. 2. A feeling of annoyance, provoking him into playing sharply “for a win,” which is equivalent to playing “for a loss.” 3. Finally, the conviction that he can achieve a draw “as he pleases. Here the weakening of his sense of danger rarely goes unpunished. (Yefim Geller, *The Application of Chess Theory*)

**DRAW IN HAND:** My friend, and master, Ron gross used to tell me “**always keep the draw in hand.**” When you are planning a complicated combination, and you see a line where you have a way out (a perpetual check or a stalemate possibility, or a forced drawing line) where, if you wanted to, you could change your mind and take the draw, you are justified in discontinuing the calculations and going for the combination. This safety net might allow you to go a few more moves deeper over-the-board so your analysis can be more in focus. As a result, if you see that the original idea or combination is not good for you, you can at least force the draw.

If you have a choice between two complicated attacks, and one of them gives you a draw in hand, the line with the draw backup is probably the better choice. You can use this same logic with lines that are not necessarily forced draws, but lines that are merely adequate. In other words, knowing that you have an adequate continuation, should you choose to abort the main line, can be reason enough to make you choose that line over the other.

There is a tendency in modern chess towards keeping the draw in hand. However, the public generally prefers the gamblers.

## **PLAYING FOR DRAWS**

Tal thought it was a crime against chess to play for a draw (at least for white). Of course, Tal was Tal. For us mortals, there are times to play for a draw.



For example, when the game turns sharply against you, if you are losing, rather than resign right away, you might as well try for a draw.

If you need to play for a draw, stay calm and reassess the game from the new perspective. Playing for a draw does not necessarily mean to adopt a passive approach. That can only make it easier for your opponent to gain control.

**Playing directly for a draw can be dangerous.** In fact, this was Alekhine's criticism of Capablanca. Alekhine thought that Capa tried to simplify whenever he got into danger. Alekhine thought that, because of his success in bad positions, Capablanca began to use this simplifying method in almost every position. By capitalizing on this flaw of Capa's, Alekhine was able to prevail in their match.

**The desire to simplify and the avoidance of complications can result in an inferior game.** You are likely to lose the initiative, which will put you on the defensive. **The best plan is to play ambitiously.** You will stay sharp and keep focused if you have an aggressive attitude. You are less likely to be tricked. By playing offensively, you are likely to have opportunities to get the draw. Besides, if your opponent is under attack, he might willingly exchange pieces, thereby leading to a more even endgame.

If your game is not inferior, but you need a draw for some reason (for example, to be in the prize money), it is usually better to play for a win, not for the draw. Playing for the draw is one of the best ways to lose the game. **“Never play for a draw in a complicated position!”** (Vlastimil Hort & Vlastimil Jansa, *The Best Move*).

## PLAYING FOR A WIN

**Many trainers recommend that you play for a win against everyone at all times. If you are playing for a win, you need to keep the position**

sharp and complicated. There are times when you should avoid playing the objectively best move, just to maintain the tension.

## BRILLIANCIES

**FEATURES:** What is a brilliant game? There are many opinions. Brilliance is abstract and subjective. Usually, though, a brilliancy contains at least a daring sacrifice or an intricate or imaginative combination or two. The game is generally considered the more brilliant the more these moves are unexpected. What is brilliant to a “C” player may be commonplace to a master. The capacity to understand and value a brilliancy generally increases with the player’s strength. It also has something to do with his style and his outlook.

**HOW:** You should not waste time looking for brilliant moves unless the position calls for it. **“Since a brilliancy is essentially an accident, it is not feasible to start any given game with the conscious intention of creating one”** (Larry Evans, *Modern Chess Brilliances*).

By definition, you must have the advantage first, before you can succeed with a brilliancy (because, if the brilliancy is sound, it proves that you had the advantage in the first place). In order for you to get that advantage, your opponent must make at least one mistake. Just as the knockout in boxing or the long touchdown in football would be impossible without the opponent making a mistake, the brilliancy in chess is impossible without your opponent making at least one mistake. That is why brilliances are easier when there is a large discrepancy in the playing strength of the players.

Sometimes, the choice comes up of whether to take a risk on a brilliancy or take a safer, but duller, win. If you want to win the game (for tournament results, ratings, or some other reason) you should take the sure win. On the other hand, if you are playing a friendly game, you should go for the brilliancy. You should learn a great deal more from the complicated brilliancy than from

the simple win.

**AS THE OPPONENT:** “Genuine brilliance occurs when sword and shield are worthy of each other” (Iakov Damsky, *Chess Brilliancy*).

Playing against a chess genius, you always get a charge of creative energy, trying to be a worthy opponent, no, not an opponent, but a partner in creating a chess masterpiece. You put more, much fantasy and imagination into such games than in ordinary chess games! (Eduard Gufeld, *Chess Art and Struggle*)

## NUTRITION

Proper nutrition is, of course, important all the time. During training, it has an effect on how well you learn, and during the tournament, it has an effect on how well you play. What you eat and drink in the hours just before and during the game is probably more critical than at other times.

Nutrition is a subject outside the subject of this book, but here are a few relevant basics: Do not eat a heavy meal just before the game (because blood is diverted from the brain to the stomach for digestion). “Whenever my opponent wants, I’ll buy him a big steak dinner before I play him. Let him try to play after that!” (Walter Browne, *Best Games of the Young Grandmasters*, Craig Pritchett & Danny Kopec).

This does not mean to play on an empty stomach. You should probably have a light meal an hour or two before the game. It is also not good to play a five-hour game without some form of energy replacement. Probably it is a good idea to have a dab of food or drink along the way, to keep blood sugar levels even. Your brain needs energy to keep up. Be sure what you ingest is something that is easily digestible and something you are accustomed to eating.

Coffee not only seems to be getting the scientific and medical green lights

these days, but it might even help your game as well. If you are a coffee drinker, drinking a little during the game (especially, during a long game), might be beneficial. Mikhail Botvinnik was a big supporter of coffee drinking. He even implied that coffee was one possible reason for his victory in his World Championship rematch with Tal in 1961. Interestingly, this was well before all of the studies that, these days, advocate the use of caffeine in athletic and cognitive endeavors.

Whatever you do, it is probably not a good idea to make any radical changes in your diet or lifestyle just before, or during, the tournament. Even eating the food at the restaurant (in the case of a tournament away from home) is a bit of a risk.

## ENERGY/STRENGTH

During the tournament, you need all the strength you can muster. Keeping calm over-the-board helps to conserve energy and increases your ability to think. This is something that you have to keep reminding yourself during the game. Between rounds and over night, it also helps if you keep from burning off any of your energy reserves.

A good night's sleep is obviously important. That means the location of your hotel room is important. So, try to get a quiet room (away from things like vending machines, elevators, train tracks and traffic).

If you are a runner or otherwise involved in physical fitness, **it is probably a good idea to refrain from running or working out while you are at the tournament.** You might even consider tapering down before the event (as a professional athlete would) in order to peak your energy for the tournament. A little walk, a light workout or an easy jog (if you can't bear the idea of skipping it) is probably not going to do any real harm, but it also will not do you any good (for your chess, that is). It will only drain energy that you could otherwise use for your chess. The only arguments in favor of working out

during the tournament would be to use the workout as a stress-reducer and to keep with your normal routine.

The ability to endure stress is an important factor for a chess player. A couple of good stress-reducers are to sit in a sauna or to take a hot bath between rounds. In sports, the physicality of the activity itself allows the player to relieve any pent-up tension. In chess, there is no outlet. It is a good idea to be physically fit enough to handle the stress of the games.

What could be more unnatural than sitting still for four or five hours while your heart is racing sometimes at 140 beats per minute? There's no outlet for all the stress. You can't punch the guy, kick a ball, or run laps. (Nigel Short, *Chess Life*, October 2007)

## **ETIQUETTE/SPORTSMANSHIP**

Do not bash your clock or slam your pieces down. If you make a winning move, do not leave the board and strut around in a triumphant manner, even if it is mate. You want to win, not humiliate your opponent. Give your opponent the chance to resign or congratulate you. If it is that good of a move, it will not take too long for him to see it.

If you win your game, particularly if you are the higher-rated player, it is good etiquette to offer to go over your game with your opponent. When you win, try to be good-natured about it with your opponent. Do not gloat, or belittle his play.

If you lose, try to congratulate your opponent on a good game. A friend of mine, Mike Searcy, made the observation: "checkmate is the end of the game, not the world." Even if you played like an idiot, let your opponent feel good about it (whining about it will not get the point back). "An essential lesson for the young (as well as the old) from the Book of Wisdom is to accept defeat in a sporting contest in the right way and derive maximum benefit from it"

(Svetozar Gligorić, *I Play Against Pieces*). Susan Polgar has an applicable motto: “Win with grace. Lose with dignity.”

I always remained calm, win or lose. It’s important for the representatives of chess to act like gentlemen. I never threw tantrums like some players were known to do. Inwardly, however, I would feel great remorse when I lost a game. (Isaac Kashdan, *How to Get Better at Chess*, Jeremy Silman)

It is considered bad etiquette to offer a draw to a higher-rated player in an even position. If you are clearly better, or the position is a theoretical draw, that is a little different. Some people think it is never appropriate for a lower-rated player to offer the draw. That custom (as well as most manners) seems to be fading away a bit, though. A draw offer should not be made more than once. If you are the higher-rated player and the position is substantially different from the last time you offered a draw, a second offer can be acceptable.

If you are a beginner, it is common to play out a hopeless game without resigning. This can be out of ignorance (not realizing the hopelessness of the situation) or from the desire to learn. Nevertheless, keep in mind that some people in some situations will take it as an insult. You have paid your entry fee and you are under no legal or moral obligation to resign a lost game, but be aware that you might not make many friends by continuing to play at some point.

## TOURNAMENT PLAY

**METHODS:** During a tournament game, you have to use your knowledge, psychology, skills, and intuition, and you need to maintain good time management. Use your time wisely. Look at your position in detail when it is your opponent’s turn to move. Always consider immediate threats (for both sides). **“Be alert, play sharp and always remember to do your safety**

**check”** (Tim Hanks, *Rank & File*, July–August 2006).

**ATTITUDE:** Each game of a tournament is a new game. Do not carry over any concerns about previous games. Forget about previous losses as soon as possible.

Weekend Swiss tournaments are a test, of not only chess, but also nerves and endurance. In the shorter events (4–5 rounds), you must play precisely in order to place well, and the long events (7+ rounds) can be physical. If there is time enough, a break such as a movie or a short sight-seeing trip can provide a refreshing break.

**DISTRACTIONS:** Becoming distracted during the game can be bad for your chess. Eliminate as many potential distractions before the game as you can. For example, turn off your cell phone, remember to bring all of your equipment, and quit smoking. Post-mortems can be a distraction, as well as an energy drain during a long tournament. Some people prefer to avoid them at tournaments. Excessive drinking the night before is another potential problem.

Long ago Botvinnik realized that it is psychologically difficult for a man to adjust at once to a new activity, for instance to a tournament game. Botvinnik therefore always took a walk before the round in order to attune himself to the coming struggle, to mobilize his force of determination and to cut himself off completely from everything that was not concerned with the game. In earlier times, he regularly arrived at the tournament hall ten to fifteen minutes before the round. These activities helped him to detach himself from extraneous distractions and allowed him to concentrate solely upon the game from the moment the clock was started. (Nikolai Krogius, *Psychology in Chess*)

# 7



## ***Time-Trouble***

*The primary goal of most moves is to make the best move in the given time available.*

**—Dan Heisman, *Back to Basics: Tactics***

**TIME-TROUBLE IS AN ERROR. Strong players should know how to avoid it. You should not regard it as it as an excuse for anything.** You have the same amount of time as your opponent. In fact, if you lose on time, you even used more time to think than your opponent did. Alekhine once said that time-trouble is as good an excuse as a criminal claiming that he was drunk when he committed the crime.

My own view is the only time you should get into time-trouble is if you are distinctly worse and need to “invest” large amounts of time to keep the position alive, or in the hope your opponent will get over-excited and try to “blitz” you. (Chris Baker, *Simple Winning Chess*)

## **CAUSES OF TIME-TROUBLE**

There are many causes of time-trouble, including:

- indecision (especially in trying to choose between seemingly equal choices)



- inability to find a reasonable move
- not trusting your intuition
- nit-picking over minor considerations
- no clear line of play
- over-checking (lack of confidence or courage)
- lack of focus
- lack of a plan
- inefficient calculation
- perfectionism
- being in unfamiliar territory
- the game not being in your style
- deficient theory or technique
- inadequate knowledge of typical positions
- poor pacing

## AVOIDING TIME-TROUBLE

**CLOCK:** As simple as it sounds, try to stay ahead of your opponent on the clock. Do not allow yourself to fall far enough behind on time that it might decide the game.

**TURNS:** The generally accepted time-management principle is **when it is your turn to move, analyze variations; when it is your opponent's turn to move, consider general strategical and positional concepts** (look at the position from his point of view, think generally, evaluate the position, and think long-term). You can also use his time to calculate forced or likely continuations. This applies most of the time. In some tactical situations, the tactics and calculations are considerations that are more urgent than the general and strategic. In such cases, you might use even his time for some tactical deliberation.

**CRITICAL POSITIONS:** The first critical moment in a game occurs

after you have exhausted your opening knowledge (you are out of your book). This is a good place to invest a lot of time. **Other critical situations can be the moment when a decisive line becomes available, before launching an all-out attack, an opening innovation is sprung on you, or a surprise combination is played.**

In critical positions, there is often a big difference, even a decisive difference, between the outcomes of your move choices. **Spend more time on contemplating critical positions.** Not only is more time usually required to consider these moves, but also you will usually be well rewarded for the time spent on them. Apportioning more time to critical moves and complicated tactical positions ensures that you give more time to the moves that give you the most return on your time investment.

**In critical positions, if you see a good move, take the time to look for a better one.** To allow for this extra time, you must **play the non-critical moves at a faster pace.** If you are not sure if you are facing a critical position, but have a gut instinct that something is going on in the position; take the time to assess the situation.

**No exact time can be placed on moves, but a critical position might need 20 minutes or more to work out, whereas non-critical moves might average 2–3 minutes (forced moves being a matter of seconds).**

Playing too fast in critical situations can cost you more time in the end by causing you to lose the thread of the game. Then, you can easily end up defending a difficult position, when with a few extra minutes devoted to the critical move; you might have been able to discover a clear and fast path to victory.

This is not to say that you should not play quickly when you are confident of the move. You exert a lot of pressure on your opponent when you can move rapidly. Just be sure you are playing the correct move.

**PACING:** Ideally, you want to pace yourself to use all of your allotted time,

to take full advantage of the maximum thinking time allowed. That way, you will have given the game your best possible effort. That means that you need to be estimating how long the game is likely to last as you go and adjusting the rate accordingly. For example, if your opponent has just sacrificed a queen and has several pieces hanging, you can usually afford ample thinking time. On the other hand, if all of a sudden, you have just transposed into a difficult endgame and you only have ten minutes left on the clock, you need to pick up the pace substantially.

Each time control has an ideal pace associated with it. Your goal is to play fast enough, but not too fast or too slow for the existing time controls. You should not try to adhere strictly to the pace. There are moves that you can make quickly and others that take more time (such as critical moves or in complicated positions).

Do not slow your pace during time-trouble (as some people do when they lose confidence and over-calculate). At this time, you should play sensible moves and maintain your pace. The basic goal is to make the best move you can in the allotted time. Check your pace on your opponent's time.

Obviously, there is no universally accepted pace that works for all conditions and all time controls. **As a rule of thumb, in a serious tournament, play the first 15 moves in a half hour and play the average move in about three minutes.** If you get ahead of the pace, you can use more time per move. If you get behind it, you have to speed up.

After the “book” portion of your opening, your pace should settle into the basic pace you intend to hold for the game. For some people, it can pay to spend a little more time on the earlier portion of the game with the idea of acquiring a better understanding of what is going on in the game. Then, even if they get into time-pressure, they will have a better concept of what is taking place in the game, so they can make quicker decisions. Part of the idea being that their opponents might even play more hurriedly if they think you are in

time-trouble. This is a risky approach and is not suited for everyone. Most people will achieve better results by playing the game at a relatively steady pace.

**TIME CONTROLS:** When you have passed the time control, it can be a good idea to get up and walk around a little, especially if you were playing rapidly to make it to the time control. In this case, you need to settle down before continuing; otherwise, there is a real danger that you will continue to play too fast.

Unless you have ample time to reach the time control, it can be useful (for either side) to repeat moves (less than three times) in order to **gain time**. You can devote more time, under less pressure, after making the control. It is also usually a good idea to avoid making committal moves just before a time control if you are short of time (unless you are sure of the move or the move is necessary).

**DECIDING:** Do not aim for perfection. Perfectionism is impractical and the cause of many time-troubles. It is good in training, but not during the actual game. If, after devoting adequate time, you have trouble deciding on your move, make a rational choice between the top candidates. Sometimes, more thought is not going to solve the problem.

The more practical and level-headed player, who always bears in mind that he is working under time control, has the advantage over an opponent who loses himself in a maze of possibilities confronting him over the board. **The perfectionist, who is always looking for the best move on the board instead of making a quick, good move, is at a disadvantage.** (Pal Benko, *Chessworld*, Vol. 1, No. 1, January–February 1964)

If one of the candidate moves gives your opponent difficult choices, that might be your best option, especially if you have a slightly inferior position. Let him spend the time deciding, instead of you.

Once you think you have found the best move, play it. Do not waste more time doubting yourself. Make a decision and play the move. “When you are unsure of yourself you tend to check too many lines too often, to take too much time. I think that it’s a question of getting into the rhythm of the game” (Joel Lautier, *interview with a grandmaster*, Aaron & Claire Summerscale). In extremely complex positions, it can pay to use your intuition instead of spending a lot of time analyzing long variations.

**PLAN: Having a plan is not only good chess, but it is an enormous help in avoiding time-trouble.** With a plan, you should already have a good idea what your move should be. This should save a lot of thinking time. Conversely, without a plan, you tend to use up considerable time on the clock.

**TRAINING: If you have a tendency to get into time-trouble, one way to cure the habit is to play training games with the sole objective of avoiding time-trouble.** In other words, play games in which playing well is secondary to avoiding time-trouble.

Another way is what Kotov did:

I practiced the following method: I would set up a complicated position and give myself the task of working out all the possible variations in the space of 20–30 minutes. Then I would write them down and check how well I had worked out all the secrets hidden there. Gradually, I reduced the amount of time, and each time checked how well I had done. Soon I managed to get rid of superficiality and speed up my thinking. (Alexander Kotov, *Think Like a Grandmaster*)

**THEORY:** Having your openings well rehearsed is a good way to help avoid time-trouble. The more you know the lines and the standard positions, the faster you can play. Understanding the basic concepts of each opening’s middlegames will not only save time, but improve your game as well.

## PLAYING IN TIME-TROUBLE

**THREAT:** If you are short of time, you do not have time for elaborate analysis. You have to settle for responding to direct threats. If you do not see a direct threat with your opponent's move, then try to determine the purpose of the move. Then, move. If you have another time control, try to put off making major decisions until it passes.

**QUICKLY:** Obviously, in time-trouble, you must move quickly. You will almost certainly play weaker by moving quickly, but, if you do not move quickly enough, you will almost certainly lose. So, make a move. It is better to make a mistake on the side of overconfidence than to lose cautiously.

**LUFT:** It is usually a good idea, in time-trouble, to create some luft. It gives you one less threat to be concerned about (back-rank mates) and it affords you some more flexibility.

**INTUITION:** You must **trust your intuition more during time-trouble.** It saves a lot of time.

**STRATEGY:** Having a plan speeds your thinking-time up immensely, but **do not make elaborate or far-reaching plans. If you are in time-trouble, it might be best to go for an endgame.**

**TURN:** On your opponent's turn, think strategy. Do not waste precious time with concrete calculations. If you look at the clock, do it on your opponent's turn. **While your opponent is thinking, figure out a conditional reply to each move that he is likely to make.**

**PIECE VALUE:** In time-trouble, knights are usually better than bishops. As the time-pressure increases, the value of knights and queens goes up. With times less than five minutes, a knight can be stronger than a rook.

**PROTECT:** In time-trouble, it is especially important to be sure your pieces are protected. Loose pieces drop off in regular chess, even more so

when you are short of time. Unprotected pieces are the main source of tactical oversights during time-trouble.

**CALM:** Nervousness consumes energy. **Stay calm.** Write your moves down neatly. Control your nerves.

**COMPLICATIONS:** Avoid complications when you are in time-trouble. Simplify the position. You do not have time to work out tactical complications. **When you are in time-pressure, play it safe. Play uncomplicated, logical, natural moves. Play the move that looks right.** If you are losing anyway, that is another story... then a wild gamble might make sense.

**SACRIFICES:** If your opponent is not in time-trouble, but you are, and he makes a reasonable-looking sacrifice, decline it. Do not take the time to analyze it. You have to assume that he has worked it out.

## OPPONENT'S TIME-TROUBLE

**STRONG:** When your opponent is in time-trouble, **playing strong moves is better than playing quick moves. If you are winning, play your normal game.** Make the best moves that you can. Do not bother trying to exploit his time-trouble. If you are losing, though, it might be worth trying. Be cunning. It might be good to choose moves that are sound but slightly unusual, or less likely to have been considered by your opponent. In other words, avoid the obvious moves.

You should have a plan. Your opponent is likely to make a natural-looking move. Try to find a plan that punishes the natural-looking moves. **In time-trouble, trying to prevent your opponent's plans from becoming effective is even more useful than under normal circumstances. He will have to spend time coming up with a new plan.**

**CHOICES:** Try to give your opponent many choices. The best situation is when he has several moves to choose from, all of which are about equal. This

way, he will consume more time trying to decide. **Avoid forcing lines.** Only play them if they are decisive. An exception might be a check, especially a couple of moves of a perpetual check, to gain time.

Your opponent, in time-trouble, is likely to be looking at one-move threats, pawn breaks, forcing tactical combinations, checks and traps. Therefore, **it is usually safer and better to make quiet moves that improve your position.** Be careful not to fall for a tactical shot.

**RHYTHM:** Moving slowly and deliberately can have the effect of slowing your opponent down and consuming more time on his clock. It can also prolong his stress, which in turn helps your cause.

**Avoid blitzing the moves.** That only serves as a reminder to him and sets a faster rhythm for the moves. If you have plenty of time, you would be wasting your advantage (which is time). Take your time. Spend your time trying to find a difficult continuation for your opponent. Moving fast only increases your own chances of blundering. **If your move sets a trap, however, blitzing might help him fall into it.**

Your opponent, in time-trouble, is likely to be nervous. He will not be able to analyze calmly and logically. His tension, though, can be transmitted to you. Be careful to avoid being swept up by his pressure and, as a result, start playing too quickly yourself.

**SACRIFICES:** When your opponent is in time-trouble, a sound-looking sacrifice can be beneficial. He will often decline it, since he will not have the time to analyze it properly.

**SURPRISE MOVES:** A long move, a quiet move, a retreating move, an in-between move, an intermezzo, a subtle move or other surprising moves can cause the opponent to take a little more time contemplating his reply.

**ATTACK:** If your opponent is in time-trouble, it might be best to attack. The defender usually spends more thinking time than the attacker



does. If you can come up with a devastating attack during your opponent's time-pressure, you might be able to overwhelm him.

**CHANGE:** A radical change in the character of the position can aggravate an opponent's time-pressure. **Creating critical positions is an ideal problem to set for the player in time-trouble.**

**DRAW OFFER:** If you have a poor position, do not forget the idea of offering a draw. Your opponent will often spend even more time deciding on the merits of the draw. Besides, if he declines it, he will be under even more psychological pressure trying to justify his decision.

# 8



## *Mistakes*

*The blunders are all there on the board, waiting to be made.*

**—Tartakower**

A GAME OF CHESS cannot be won without at least one mistake. “If you have a forced win, it can only be because your opponent has played badly at some earlier stage of the game” (I.A. Horowitz, *Chess Traps*). Humans will probably always play imperfect chess. Even computers cannot play perfect chess, and they might not ever be able to.

There are as many different kinds of mistakes as there are principles. Even taking too much time or not getting enough sleep is a form of mistake.

Blunders are mistakes, too, just big ones. The causes of blunders are the same as mistakes. Lower-rated players tend to blunder more often than higher-rated players do, especially earlier in the game. “A blunder does not necessarily have to be a single move—an entire strategy that is unsound or inappropriate, for example, can be equally disastrous” (Angus Dunnington, *Blunders and How to Avoid Them*).

George Koltanowski had a great sense of humor, and he often mixed it with good practical sense. As an example, he once said, “If I win, it was a sacrifice. If I lose, then it was a mistake” (George Koltanowski, *Chess Quotations from the Masters*, Henry Hunvald).

The game of chess is impossible to play without mistakes. Most games of

chess are not so much won, as they are lost. Winning is mostly based on avoiding mistakes. The player who makes the most mistakes will usually lose. It might only take one mistake to lose the game. You can play 40 or 50 great moves, or play beautifully for several hours, and one bad move can lose the game for you. **It usually takes more than one mistake to lose a game, though.** Normally, many mistakes are overlooked by the opponent. Because of that, you frequently get an extra chance or two, but not always.

Avoiding mistakes is the hallmark of a strong player. In fact, you can judge the strength of a player by the degree of mistakes he makes. Avoid even minor mistakes. Avoid common mistakes and oversights.

**When:** Mistakes are usually made when you are:

- exchanging pieces or pawns
- moving pawns
- optimistic or over-confident
- in bad or unfamiliar positions
- under pressure (time or attack)
- switching from attacking to defensive mode
- when you are pressing too hard for an attack
- in critical positions
- following a previous error
- when your pieces are restricted

**BUNCHES: “An old truth: one mistake leads to another”** (Rashid Nezhmetdinov, *Nezhmetdinov’s Best Games of Chess*). Mistakes tend to lead to more mistakes and a chain reaction takes place. Whether it is because you are in a mistake-prone frame of mind, demoralized over the previous mistake, distracted, or whatever; it is well known that one mistake or bad idea is often followed by another.

One reason for mistakes coming in bunches can be that the player is

following a flawed plan or idea. Often, mistakes come in pairs or even threes. Moreover, when they do, often the subsequent mistakes are even more severe. **That is why it is crucial, after making a mistake, to recognize that a series of errors may follow if you do not stay calm, take some time to regain your self-control, reevaluate the position, reconsider your plan and play more carefully.**

Interestingly, it has been observed that a mistake will often incite a mistake on the opponent's part. "As a rule it sometimes happens that when you make a mistake yourself it provokes a similar reaction by your opponent" (Svetozar Gligorić, *I Play Against Pieces*). "Psychologically it is surprising how often an error provokes the opponent to make a mistake of his own" (Igor Stohl, *Instructive Modern Chess Masterpieces*). Thus, not only should you be more vigilant after a mistake, but keep an eye out for your opponent to follow suit.

**EXPLOIT:** You need to exploit mistakes and you need to do it right away, while the opportunity exists. When your opponent makes a mistake, you should **pounce on it. One move later can be too late.** If it is a big enough mistake, the game can be decided by it. "An opponent's oversight, a mistake, a weak move—such opportunities must be seized on the instant; a move later, and the chance will have gone" (Emanuel Lasker, *The Middlegame in Chess*).

"No game can be won without some mistake on our opponent's part, and what is more important, mistakes do not merely happen of their own accord. Ample opportunity must be afforded for their occurrence!" (Hans Kmoch, *Rubinstein's Chess Masterpieces*). Just as in sports, **provoke an opponent into making a mistake.** Feints and traps are used in all sports. Chess is no exception.

When someone tells you that he outplayed his opponent to win, what he means is that he forced his opponent to make errors. None of the breakthrough sacrificial combinations we all admire would have been possible without at least one error by the victim. So-called positional

masterpieces themselves depend on certain lapses of judgment by the loser, even if this is no more than a poor choice of opening.” (Samuel Reshevsky, *The Art of Positional Play*)

**CORRECTING: Analyze your games and pinpoint your mistakes.** You have to learn from them. Find out why you made them and try not to make the same mistake again. In this way, you will improve (you do not improve so much by winning, but by learning from your losses). At the core, **a mistake is based on a lack of understanding about something.**

In the game, it is important to recognize that you have made a mistake and to get immediately back on the right path. Do not assume that all is lost; you should adjust, reorient yourself, and find a new strategy under the current situation. The strong players can do this.

I am convinced that a chess player’s attitude to his own mistakes can serve as a gauge of his strength and his prospects. The weak player tries to forget his mistakes as quickly as possible and is soon committing fresh ones, which may be even cruder. **The strong player treats his mistakes with an attentiveness that borders on love. They become the object of prolonged and painstaking analysis; he constantly remembers them, but looks for ways to avoid meeting them again.** (Grigory Sanakoev, *World Champion at the Third Attempt*)

## CAUSES OF MISTAKES

**MISCALCULATING:** The most important mistakes are usually made by miscalculating exchanges. When this happens, it is frequently the first move of the variation that is the mistake. Often, the move overlooks an elementary tactic or threat. To avoid this kind of mistake, before playing the move, double-check your calculations. In a combination, take time at each move to

recalculate and double-check everything.

**MOVE ORDER:** The move order is another source of mistakes. An otherwise good combination can be unsound if the moves are not played in the correct order. A common type of move order mistake is making the assumption that when a piece is captured that we have to recapture right away. Often, there is a better move order or a *zwischenzug*.

**CARELESSNESS:** Carelessness is one of the most common mistakes. Leaving a piece unguarded is a common example of carelessness. Not looking accurately for forcing replies to the move you are about to make.

**OVERCONFIDENCE:** Being overconfident can cause a player to play too fast. Often, this happens when everything is going your way. You become vulnerable because you are not giving enough credit to your opponent. Often, this happens when the opponent plays the opening weakly. You tend to underestimate him after that.

**OVERCONFIDENCE IN OPPONENT:** We often trust that our opponent (especially if he is higher-rated) has initiated a correct combination. You should always verify (doublecheck) the combination.

**OPPONENT'S MOTIVE:** Do not forget to try to understand why your opponent made the move he did. Ignoring or not noticing your opponent's threats, or thinking of your own plans to the exclusion of your opponent's plans, can lead to mistakes. When you do not consider your opponent's possibilities, you are likely to overlook a strong reply. **After every move, you should ask yourself "why did he make that move?"**

**OVERSIGHTS:** Certain kinds of moves are easily overlooked. **Long moves, especially diagonal ones, are often overlooked** because your attention is focused on a small part of the board. **Retreating moves (especially by the attacker) are frequently overlooked** because of the natural tendency to want to move toward your opponent. This same tendency accounts for another common oversight: failing to notice threats on the ranks. We tend to see

vertical threats more readily than horizontal ones. “A player is inclined to play “bottom up,” i.e., from his own side of the board, towards his opponent. Because of this, the effect that pieces can have on a rank escapes our attention now and then” (Herman Grooten, *Chess Strategy for Club Players*). Knight moves are also often hard to see because of their unusual move.

**MOVING TOO FAST:** One of the most common mistakes is that of moving too fast (or not taking enough time to consider the move adequately). This can stem from a lack of patience, carelessness or a lack of knowledge. **Unless you are in time-trouble, or a move is forced, you should never move without adequate thought.**

**FEAR:** Being overly cautious is about as bad as being too careless. Sometimes, a player is too afraid to make a mistake that he shies away from making a decision. Not only will this lead to time-trouble, but mistakes as well. “Chess players know that an excessive fear of making a mistake leads to an inevitable lowering of the quality of one’s play” (Garry Kasparov, *The Test of Time*).

**PRESSURE:** When under the pressure of an attack or the initiative, it is common to be more susceptible to mistakes. Most oversights and blunders are made by the defender.

**PSYCHOLOGY:** It is natural to see the tactical opportunities for yourself in a position, rather than those for your opponent. That makes it easier for us to overlook his possibilities. That is also one reason why we tend to play better against stronger opposition; we respect their ability and, therefore, spend more time looking for what they are trying to do.

Being distracted or being in time-trouble can cause psychological pressure, just as being ill can. If you are depressed about the current condition of your game, or are shocked by a recent tactic, it can upset your psychological state, which often leads to mistakes.

**SURPRISES:** We often do not look for hidden or unusual moves because

most moves made by both sides in a game are quiet moves without any real venom. Analyze moves that are slightly odd, thoroughly, for surprises.

**TIREDNESS:** Mistakes are often caused by being tired. You can improve your stamina by being physically fit.

**FORM:** When you are in poor form, the simplest moves seem to take too much time. Time-trouble is often an indicator of poor form. Severely poor form manifests itself in the form of blunders and the misunderstanding of simple problems. “Every player has in the course of his career periods in which he at times plays very well and at other times plays in quite mediocre fashion, and this is indeed only natural” (Paul Keres, *Paul Keres: Road to the Top*).

## AVOIDING MISTAKES

**REEXAMINE:** After every move, reexamine the position. Do not rely on your prior analysis; the position is different.

**BRILLIANCE:** When you have a choice between a simple, safe win and a speculative brilliancy, take the sure win. Going for the brilliancy is often the time when mistakes are made. It is much more important to avoid errors than to create a brilliancy.

**EXPERIENCE:** With experience, your recognition of various patterns will warn you about potential mistakes. You will recognize the signs that alert you to possible tactical shots and positional errors. With this experience, your mistakes will decrease.

**SAFETY CHECK:** Even in a quiet position, it is a good idea to do a last check for tactical shots and traps. You also want to be sure that you have not left anything hanging or susceptible to a double attack. Look at every one of your opponent’s captures, discoveries and checks. **“Have a “safety checklist” before moving a piece: no pieces hanging, no one-move mate threats, simple tactical threats, what if checked on next move (HOTch)”** (Tim



Hanks, *Rank & File*).

## PLAYING AFTER BLUNDER

Often, after blundering away an advantage, the demoralization process prevents us from salvaging even a draw from what was once a promising game. We then bang out our next move, if for no other reason than to show our opponent that we had anticipated the current situation or that we are not rattled by it. By reacting in this manner, another blunder is likely to follow.

Instead, **after a blunder, we need to refocus on the new situation.** Often, not everything is as bad as it seems. Then again, if we do not get in the right frame of mind before moving, it can all disintegrate quickly. The best way to refocus is to **take a break. Take a walk, calm down, and then reevaluate the position and form a new strategy.**

Negative emotions are not going to help. Look at the position objectively and try to find a solution.

## LUCK

Some have said that the most important factor in chess is luck. Others have said that good players are always lucky. Some say that there is no luck in chess at all.

It is possible to play the game of chess as a game of chance by picking moves at random. This is almost how beginners play. However, the stronger a player gets, the less is left to chance.

Certainly, tournaments have an element of luck in them. Who you are paired with is, in a sense, a matter of luck. How many whites you get in a tournament is a matter of luck. Games contain some luck, too. For example, if your opponent blunders, it is good luck for you. We are lucky if our opponent becomes over-confident or fearful. If our opponent plays into our favorite

variation, we are lucky.

One way to cultivate your own luck is to create psychologically uncomfortable conditions for your opponent. Create conditions in which your opponent is likely to make mistakes. “You should not just hope that your opponent is going to make a mistake—you have to help him do so” (John Nunn, *Secrets of Practical Chess*). “A big blunder is not bad luck, it is bad play. Good luck happens when your opponent blunders, but you could argue that you played better across the whole game, and that is good play not good luck” (David Lemoir, *How to be Lucky in Chess*).

# 9



## ***Studying / Training***

*It has been said that man is distinguished from animal in that he buys more books than he can read. I should like to suggest that the inclusion of a few chess books would help to make the distinction unmistakable.*

**—Emanuel Lasker**

### **WHY, HOW & WHAT TO STUDY**

**WHY:** Studying saves a lot of time. Chess books contain the accumulated wisdom of two thousand years of the thinking of some of the smartest players in history. **You can learn more from one book than from many years of raw experience.** “You need to study to acquire both deep positional understanding and sharp killing tactics in order to reach a high level of chess” (Melikset Khachiyani, *Rank & File*, January–February 2008).

**You are only as good in chess as your knowledge and experience. No matter how much chess knowledge you have, you cannot know everything.** We can all benefit from studying. “I’ve been a world-class GM for decades, and I forget things about chess.... I make it a point to review and remember the crucial things” (Lev Alburt, *Chess Training Pocket Book*).

**HOW:** Nimzovich recommended studying positions of one type at a time, as opposed to mixing them up in a study session. He thought that studying various types of positions concurrently would be confusing and not as

conducive to understanding.

Try to do as much analysis in your head as possible. Doing the moves and variations in your head trains your calculating ability. The more you do it, the better you will get at it. **“The reading of chess books without the aid of a board is also to be recommended”** (Nikolai Krogius, *Psychology in Chess*).

It can be an effort to study properly. Skimming through the material is not the same as studying it. If you want to have a good chance of remembering something for any length of time, you actually have to study it. You have to focus on it. Even a good chess coach will not help if you do not put in the time and quality effort.

**WHAT:** We all like to study what we are good at; that probably has a lot to do with why we are good at it in the first place. In contrast, **it is best to study the area in which you need the most improvement.** A chain is only as strong as its weakest link. **If you are weak in one phase, no matter how good you are in the others, you will probably lose most of your game where you are weakest.** Concentrate on improving your weaknesses more than your strengths. **“Chess players who aspire to improve would do well to put aside their opening books and invest their time and money in quiz books”** (Joel Benjamin, *Chess Life*, December 2007).

Since, for the writing of this book, I have read, studied and summarized so many books, periodicals and other chess media, you might be interested in some of my personal recommendations. Here are a few books that I think are especially good (for various reasons):

- Zurich International Chess Tournament 1953, David Bronstein
- *My 60 Memorable Games*, Bobby Fischer & Larry Evans
- *Chess Master vs. Chess Amateur*, Max Euwe & Walter Meiden
- *Alexander Alekhine's Chess Games, 1902-1946*, Leonard M. Skinner & Robert G.P. Verhoeven

- Chess World Championship 1972, Fischer vs. Spassky, Larry Evans & Ken Smith
- *My Great Predecessors* (the series) by Garry Kasparov

## STUDYING GAMES

**WHY:** By playing over many games, you learn to recognize patterns and themes. You also learn principles and technique from the annotations. The more basic theoretical positions a player has incorporated into his arsenal, the better.

By playing over master games, you will assimilate tactical and strategical patterns that contribute to your understanding of the game. Pawn structures, maneuvers, checkmates, strategical themes, all in context, help you to sort out the mysteries of chess. Studying master games is one of the best ways to learn to master the game.

**HOW:** Go over master games, especially ones with the openings that you play. Learn the middlegame plans that are associated with them. **Study the themes; do not just memorize the moves.** By going over several games from the same openings, you will start to appreciate some of the more subtle nuances.

Go over the games of the great masters, the “classics.” Analyze the moves by first covering up the notes, and then look to see what the author has to say. Memorizing classical games will help teach you the strategy of chess.

An important part of your chess preparation is memorizing classical games. They will teach you the strategy of chess. To be world champion—at the level of Alekhine and Kasparov—you must know cold 1,000 of the most important games of top players. But, even if you know only a few, that will help very much to increase the level of your playing strength. (Rashid Ziyatdinov & Peter Dyson, *GM-RAM*)

Read the annotations and **study the games thoroughly**. Play over a game without reading the annotations and write down your own comments and variations. Then, go back and compare them with the author's notes.

Play over large numbers of grandmaster games at a pace slow enough to absorb the new patterns and ideas. To avoid building an entirely 'passive' vocabulary, one must balance this with playing enough chess to put these new ideas into practice." (Jonathan Levitt, *Genius in Chess*)

One good way to study games is to play a game from beginning to end; then, go back and carefully study each phase of the game, and notice how each part relates to the whole. Examine the middlegame and endgame and how they related to the opening. Then, go back and study the whole game over again.

**When you study chess, study the complete game. There is no better way to improve your chess than by studying a complete game. The opening moves with their ideas should be observed as they move into the strategy of the middlegame—which then evolves into the final stage—the endgame.** (Larry Evans & Ken Smith, *Lessons with the Masters*)

To simulate tournament conditions when studying, Kotov suggested analyzing a complicated, sharp position for a specific amount of time (half an hour) without actually moving the pieces. Write down your observations and conclusions. Then, compare your notes with the author's notes. **"Try to analyze in your head every chance you get. The more you do it, the better at it you will become"** (Bruce Pandolfini, *Weapons of Chess*).

Most people rely too much on the notes. **Challenge the annotators.** Think for yourself. Do not assume everything they say is correct. Often, it is not. By being skeptical, you will find out, and understand at a deeper level, what you missed. In some cases, you might have found an error or have a better idea.

The middlegame is best studied by examining games played by the best players, preferably with their own notes. In this way, you can get a picture of how each player approached the positions, and how they weighed the various factors involved. It is all too easy for an analyst to point out that one player successfully employed a particular strategy, but that is only one part of the thought process. When champions meet, often they each write detailed commentaries to the games. These analyses can be quite different. At times, reading Botvinnik's and Bronstein's notes to their encounters, they hardly seem like the same games! (Eric Schiller, *Encyclopedia of Chess Wisdom*)

Analyze an interesting position by moving the pieces around. Try variations. **Stronger players tend to analyze positions a lot**; weaker players usually do not. Try to determine why several of the candidate moves were not played. Try to predict the master's next move. "Play over a thousand games. It was said that Fischer played over more than 20,000 games. Light or no notes, with real pieces and a chessboard" (Bob Long, *Chess Reports* #63).

Former World Champion Mikhail Botvinnik... suggested that an aspiring chess player should deeply annotate games and publish, or at least circulate, the notes to the game so that critical feedback would point out errors in judgment or analysis which could then be examined and eradicated. (Eric Schiller, *The Chessplayer's Laboratory*, Vol. 1)

**WHAT:** "It is certainly no secret that the best and probably the only road to mastery in chess is profound study of the games played by chess masters" (Tigran Petrosian, *How to Open a Chess Game*). The best game collections to study are those that are well annotated by a competent annotator.

These days the young study, they know everything and then a little bit more about modern chess, but sometimes they miss out on knowledge

from the old masters, from people like Rubinstein, from the guys who made our game of chess, who formed the basis of the knowledge which we use now. (Emil Sutovsky, *interview with a grandmaster*, Aaron & Claire Summerscale)

**The best games to learn from are usually the games between players of vast differences in abilities.** Many experts believe that the best games to analyze are not the games between the top grandmasters, but those between strong players and amateurs. The grandmaster-grandmaster games are often not as instructive because the mistakes are so few and so minor that we do not generally learn as much as when a game is full of errors.

We learn the most from mistakes, and yet, games between grandmasters are not usually full of mistakes. The moves that these players “did not play” would often be more instructive. The annotations in a good collection will incorporate many of these inferior lines for instructive purposes. “In modern chess most of the beauty resides in the annotations. Brilliances often exist only as grace notes—because the opposition anticipates and thwarts them with appropriate rejoinders” (Larry Evans, *My 60 Memorable Games, Bobby Fischer*).

Games from about one hundred years ago are good for amateurs to study. In those days, defensive technique was undeveloped. As a result, it makes it easier to learn how to play an attack.

**It is well-known that the most instructive games for novices are those which involve players from the Classical and Romantic periods of chess, roughly between 1890 and 1930.** This is due to the general lack of defensive technique seen in those games. Because one side often lets an attack succeed, either through ignorance of the threat or failure to appreciate the positional factors of the game, we can see how an attack is built and carried out in its pure form. In more recent games, direct attack usually does not succeed because players are better schooled in the art of



defense. (Eric Schiller, *Learn To Attack*)

Plans were often carried out by both sides without much consideration of the opponent's plans; so you can see the plans in their entirety. Even as late as the Hypermodern era, often the disparity between the players was so great that the natural plans would unfold without serious obstacles.

The games of Morphy, Anderssen, Rubinstein, Alekhine, Capablanca, Reti, Nimzovich, and others are great for learning because they out-classed their rivals to such an extent that it is possible to understand the lessons contained within them. "The average player will more easily learn to play commonsense chess from the games of Morphy than any other player" (Cecil Purdy, *the Search for Chess Perfection II*). Alekhine, in particular, is good to study because he was also noted for his excellent annotations. "An 'old' game can be as important as a recent one—sometimes even more so! A game where there is weak play (by either side) teaches—you learn how to punish or defend" (Ken Smith, *Theory of the Smith-Morra Gambit in Games*).

When games between masters and amateurs are played, the amateur's mistakes are usually punished. This makes for instructive analysis. Games between experts and D-players can be an excellent source of training for class players. Unfortunately, there are not a lot of books available that contain games between masters and amateurs or experts and D-players. **Tournament bulletins** can be good for this purpose, but they are not usually well annotated (especially the games between players with large ratings differences).

One of the few books dedicated to games between players of unequal ability is the Max Euwe & Walter Meiden collaboration, *Chess Master vs. Chess Amateur*. Here is a quote from that book on the subject:

When a master plays an amateur, he is normally confronted with a different type and a greater number of inferior moves and errors than he would find in master play. These are precisely the inferior moves and

kinds of errors which the amateur meets constantly when playing other amateurs. What better way could the amateur have of learning how to exploit the weak play of fellow amateurs than to study how a master would handle such positions? If the brilliant games of Paul Morphy against the masters of the nineteenth century seem much more instructive to many amateurs of today than the far subtler victories of twentieth century grandmasters over fellow grandmasters, it is precisely because Morphy's victories over his far weaker opponents provide a more striking example of how to exploit to the maximum the more serious errors of the weaker player. (Max Euwe & Walter Meiden, *Chess Master vs. Chess Amateur*)

Often, you can also learn a lot, in a short time, by going over miniatures. "You should never miss the chance to play over any miniature (any game less than 25 moves). Such games usually contain useful tactical ideas that can be reproduced in your own games" (Geoff Chandler, *Master Chess*).

Generally, analyzing a blitz game between amateurs is foolish, since the quality is normally so low. Still, sometimes, there can even be lessons to be learned from them. Since mistakes are part of what we seek in the learning process, and blitz games often provide an ample supply of them.

**HERO: One of the best ways to study games is to pick a hero and study his games. If you like his style, you should also consider adopting his openings.** Attacking, tactical players might choose players like Tal, Kasparov, Alekhine, Spassky, Topalov, Keres, Christiansen, Shirov or Nezhmetdinov. "Former World Champion Mikhail Tal once said that even very strong players can significantly improve by studying the games of rubinstein" (Eric Tang-born, *A Road To The Master Title*).

It has long been my practice to get into that proper, aggressive frame of mind by reviewing beautiful attacking games of the past. Ones that I

return to again and again for refreshing tastes of attacking samples are the collected games of great attacking geniuses such as Alekhine, Keres, Tal, Kasparov, and Shirov. (Larry Christiansen, *Rocking the Ramparts*)

A potentially good tactical hero is IM Rashid Nezhmetdinov (1912–1974). Nezhmetdinov was arguably the best tactician of all time. He had a plus score against World Champions. He beat Mikhail Tal in three out of their four encounters. Tal asked him to become one of his trainers for the 1960 World Championships. Mikhail Botvinnik once said, “Nobody sees combinations like Rashid Nezhmetdinov” (Alex Pishkin, *Super Nezh*). “One of the most brilliant combinative players in history” (Nigel Davies, *The Power Chess Program*). “Nezhmetdinov, a follower of the romantic school of Anderssen and Morphy, has lifted many a well-known Russian grandmaster out of his seat with his brilliant play” (George Koltanowski, *TV Chess*).

The International master Rashid Nezhmetdinov is a virtuoso of combinative chess. Therefore each of us, before the start of a game with Nezhmetdinov, decides on a definite plan to limit strategy; that is, a plan whereby it will be easy for us to make combinations, but difficult for our opponent. Everyone understands that one can in fact only realize such a plan in one’s dreams; in the game, everything is much more complex. However, one fact is indisputable: when playing someone with as rare a gift for combinations as the master, Nezhmetdinov, each of us tries our utmost to heighten our state of readiness for action and subordinate our efforts to the main task, that of guessing, anticipating and eliminating any combinative breakthrough. (David Bronstein, *200 Open Games*)

**Studying the games of positional players can help you develop a positional sense. A clear strategic game can contribute to your understanding of themes and planning.** Good choices would include the

games of Karpov, Botvinnik, Capablanca or Petrosian. The games of Capablanca, Alekhine and Botvinnik are good for class players to study. Just playing over games by these greats can give you a “feel” for where the pieces should go.

**Consider adopting more than one hero.** That way, when you are in a tactical spot, you can play like your tactical hero and when the position calls for a positional move, you can try to imagine what your positional hero might do.

## STUDYING OPENINGS

**WHY:** “To play chess at a high level these days, one is simply required to study one’s openings thoroughly” (Tim Taylor, *True Combat Chess*).

It may take a lot of time to study theory, but it saves time a lot of time, too. By learning openings, you are benefiting from the accumulated experience of thousands of players who played millions of games over hundreds of years.

It is important, at the class level, not to spend too much time studying openings, though. You should not displace the learning of tactics and strategy by studying openings. By using sound opening principles, you should be able to get a respectable opening.

**HOW: When you study an opening, you should focus on the most important critical positions and the middlegame that results from the opening. Do not just memorize moves.** In fact, Botvinnik once said that the “memorization of variations could be even worse than playing in a tournament without looking in the books at all” (Mikhail Botvinnik, *How to Open a Chess Game*).

How do grandmasters and masters study openings? How many openings and systems does one need to know?... The final conclusion is the one borrowed from the wisdom of old—“You have to know everything about something, and a little about everything.” Applied to chess this advice

means that **you have to know everything about the openings which you are going to use regularly, and also know the general ideas behind all the openings.** One has to bear in mind that praxis can come up with some strange things, and you cannot guarantee that you will not suddenly come up against an opening that you have ignored and not studied. (Alexander Kotov, *Train Like a Grandmaster*)

**When learning openings, you should try to play complete games.** That way you can become familiar with the strategies, middlegames, pawn structures and tactics typically associated with those openings. **Avoid opening books that stop after 15–20 moves.** Look for books with complete games and good annotations.

When first studying an opening I like to begin by looking at the games of strong players, in other words, the ones that show the best understanding of the system. Before looking at the detail of variations, I think it is good to get an idea of *how* an opening is used. (Michael Khodarkovsky, *The Grünfeld Defense*)

These days, studying openings has been made so much easier with the advent of such incredible learning aids such as Chess Openings Wizard (from Bookup), the computer databases and chess-playing software (such as Rybka, Fritz, Junior and Shredder). These kinds of products not only make learning so much easier, faster and effective, they are far more comprehensive than anything could possibly have been in the pre-computer days.

**WHAT:** Countless players, especially class players, waste a great deal of time studying inferior openings. They study these inferior openings because they do not want to become bogged down in theory. They reason that, by avoiding the main lines, they will not have to study as much. It is probably wiser, though, to spend that same amount of study time studying the main

lines. One benefit will be that there will be more games available to you to study, if you do. When you choose an opening to study, pick one that interests you, and one that is also sound.

**When you study openings, it is a good idea to spend twice as much time studying the black lines.** Most people do the opposite because they enjoy having the advantage of the first move.

**Look for books that have a copious amount of words in them.** You want to learn what is going on, not just the moves. Many opening books are not much more than just variation after variation. **Look for a lot of text. The strategies and ideas behind the openings are crucial factors in your mastery of the lines.**

## STUDYING TACTICS

**WHY:** Tactics are an important part of the game; some say tactics are almost the whole game. “Although chess consists of many different elements, the single most important factors in deciding the outcome of a game of chess are tactics and the calculation of variations” (Valeri Beim, *How to Calculate Chess Tactics*). A game of chess can be played almost flawlessly for several hours and one simple tactical mistake can ruin the whole game.

You cannot improve in chess without a corresponding improvement in your tactical strength at the same time. **A player’s tactical strength is the most accurate measure of how good a chess player is. In most amateur chess games, the stronger tactical player usually wins.** So, until you get to the higher levels of chess, you should devote most of your study time to tactics.

**The quickest way to improve at chess is to study tactics. It has been suggested that a person can reach the expert level just by studying tactics.** Even the top combinational players keep their tactical skills sharpened by constant tactical training.

It is essential to be able to anticipate tactics before you can begin to find an effective defense for them. Knowing the signs that tactics might be lurking in a position saves a lot of time. If you do not have this ability, you will have to calculate many extra variations to rule out the nonexistent tactical threats.

To be able to play positionally, you must have an understanding of tactics. Having a solid foundation in tactics is crucial for good defense as well as for attack. “If you refuse to study tactics then, to quote GM Miguel Quinteros, you are ‘doomed to remain weak’ and are ‘well advised to take up something else, like knitting” (Michael de la Maza, *Rapid Chess Improvement*).

A lot of people smiled when Mikhail Tal admitted that he liked to watch children’s chess programs on television. But, despite being a World Champion and one of the greatest tacticians of all time, he claimed that he was still learning from these simple patterns. (Martin Weteschnik, *Understanding Chess Tactics*)

**WHAT:** You have to learn the basics of tactics (such as the pins, skewers, forks, and double-attacks) and you have to learn the standard checkmating patterns. **Practice with books of combinations and tactical puzzles.** “You must practice solving positions with tactical solutions until you become comfortable with all the standard concepts” (Fred Wilson & Bruce Alberston, *Tricky Chess Tactics*).

**Study and play some of the daring Romantic openings** like the King’s Gambit, Evans Gambit, and the Max Lange Attack, even if just in casual games. These opening will help sharpen your tactical and attacking skills.

Study the games of tactical players. “To miss a beautiful win and then go on to lose is a common failing amongst weaker players. There is a cure! A good dose of Morphy, washed down with a couple of hours studying tactics” (Geoff Chandler, et al., *Master Chess*).

A big part of combinations is calculation. So, **practice calculating.** “By far

the most common reason why people miscalculate is because they don't understand how to calculate properly in the first place. Surprisingly few people practice or study this part of the game" (Daniel King & Chris Duncan, *Choose the Right Move*).

These puzzles and problems are not just to be found in books. You can find them in magazines and on the internet. Tactics software is another great way to practice. CT-ART, developed by GM M. Blokh, is great. Toby Tobiasson, at [tobycheess.com](http://tobycheess.com) has some good tactics software (and he claims the "World's largest collection of tactic & checkmate puzzles), including his training software "Deep Tactics."

**HOW:** You have to know the basic tactical patterns. They have to be internalized like elementary arithmetic. Study simple tactics to the level of being able to do them in your sleep.

"No technique is any help if a player lacks keen combinative vision. This quality must be developed and trained by regularly solving appropriate exercises" (Mark Dvoretsky & Artur Yusupov, *Attack and Defense*). The best way to improve your combinational skills is to play through and study collections of combinations. Just as musicians practice scales and other rudiments, a chess player must practice combinations and complex calculations. "If you work on tactics and calculation 5 or 6 days per week, then it will be quite sufficient to spend only 10–15 minutes per day, no more. But it must be done regularly!" (Valeri Beim, *How to Calculate Chess Tactics*).

I agree with Pavel Lobach, a known Russian trainer that "solving the combinations daily must become a regular part of a daily sporting routine for a chess player, the same as food and sleep;" I always insist that my pupils followed this rule. Duration of the session should be 60 minutes or more. (Irina Mikhailova, *Strategy or Tactics—Which is More Important?* [Chesscentral.com](http://Chesscentral.com))



Try to avoid moving the pieces when solving combinational problems. Most of the time, do these puzzles in your head for maximum benefit. Taking it a step further, try looking at the puzzle, then closing your eyes and solving it blindfolded.

The best way to improve your tactical vision is to play over the first 10–15 moves of an annotated master game (*My Best Games of Chess 1908–1937* by Alekhine or *My Best Games* by Karpov are excellent for this purpose). Take the winner's side and cover up the moves. Then try and guess each subsequent move. Write all your positional and tactical thoughts down in a notebook, and only when you have done your very best should you look to see what was actually played. (Jeremy Silman, *The Complete Book of Chess Strategy*)

**After you have solved a puzzle, try to understand what made the tactics possible.** That way, you will become more aware of the conditions that are right for the discovery of tactics in the first place. This will help you to spot the tactic when it appears in a real game.

Play over and study tactical games. Annotated games of Tal, Alekhine, Nezhmetdinov, Shirov, Kasparov, and other tactical players, are great to study. When you get to the middle-game, try to anticipate the moves. Try to move your pieces as little as possible. **Try to follow as much of it in your head as possible.** A good way to do it is to play the main line on the board and try to follow the variations in your head.

To study tactics, I recommend my timed tactical software program, or similar software programs. A good book of combinations is beneficial too, but less efficient and not as fun. Basically, set up a cycle of ten positions, go through them until you get a perfect score, then set a cycle from 10–20, get a 100% score, then go through problems 1–20, repeating this cycle

until you can go through 1000 problems “by hand” (not mind) without any mistakes. If you try this method with my tactics program and complete it, you will have the tactical ability of a Grandmaster. I have had more than a hundred students and nobody had enough will power to finish this tactical training method. Is it my students or is it me? Well, take only thirty minutes a day and slowly memorize 1000 problems; take a year or two if you have to. It comes down to will power, and that I cannot provide. (Rashid Ziatdinov, *Ziatdinov Training Tips, Part 5, Tactics vs. Strategy*, [jeremysilman.com](http://jeremysilman.com))

## STUDYING ENDGAMES

**WHEN:** Studying the endgame should absorb more of your study time than studying openings. Opening theory is changing all of the time, while **endgame theory stays relatively constant**. That being the case, you are less likely to waste your study time if you spend your time studying endgames instead of openings.

**Beginners should start with the endgame instead of the opening. Studying positions of reduced complexity you can gain an early understanding of certain deep principles that would be impossible to feel in complex middlegame positions.** Then, once we understand the principle, we can apply it to much more complex positions. (Josh Waitzkin, *Chess Life*, August 2007)

According to various authorities, most players learn the game backwards. They learn how to move the pieces, some basic checkmates, then a few openings, then a few general principles and some tactics, then more openings, the middlegame, and eventually, some (not all) of them finally get around to studying the endgame. These authorities recommend starting with the

endgame. Furthermore, many recommend that you not only start there, but that you continue to focus on the endgame.

On the other hand, some people argue that beginners should study the endgame last because they might not even get to the endgame (if they do not do well enough earlier in the game). That might be true, but why waste all the time getting to the endgame if you are going to lose the game anyway with poor endgame technique? **“If you have any doubt about what to study, study endgames. Openings teach you openings. Endings teach you chess”** (Stephan Gerzadowicz, *Thinkers’ Chess*).

The reasoning is that you need to know where you are headed before you can chart a course to get there. If you do not know, for example, whether a rook is better than two minor pieces with a certain pawn structure, you cannot know how to proceed.

Capablanca himself stressed the importance of the endgame when he said, ‘In order to improve your game, you must study the endgame before anything else, for whereas **the endings can be studied and mastered by themselves, the middlegame and the opening must be studied in relation to the endgame.**’ (Irving Chernev, *Twelve Great Chess Players and Their Best Games*)

**WHY:** One good reason to study endgames is that most players are deficient in this area. If you are one of them, you will benefit by studying the endgame. If your opponent is one of them, and you are strong in the endgame, you will have a huge advantage over him. “Endgame technique is the key to advancing to the highest levels of chess” (Eric Schiller, *Improve Your Endgame*).

If you are strong in the endgame, you can often head right for the endgame to take advantage of those strengths. Stronger players often use this approach against weaker players (who they assume are weak in the endgame).

**A study of the standard endings is of first importance to the struggling chess student. A complete understanding of these important fundamental positions will enable you to win many a game you would otherwise abandon as hopeless.** Neither will it be necessary, once you are equipped with this knowledge, to “fiddle around” with a position for thirty or forty moves when it should take you less than half that time to complete the win. (Kenneth Grover & Thomas Wiswell, *Chess*)

**WHAT:** Pawn endings, rook and pawn endings and rook endings are among the most useful and best for basic training. Pawn endings are good for training your calculation abilities. Studying practical endgames, like rook endings, is a good use of your time. Reuben Fine’s *Basic Chess Endings* is one of the best books for studying endgames.

**Fifty percent of all endgames include rooks and a hundred percent include kings!** Queen endings and minor-piece endings happen somewhat less often because these pieces are more easily exchanged. So, based on frequency of occurrence, **it seems sensible to emphasize endings with just pawns, as well as those with rooks and pawns. But, it can’t hurt to make endgame analysis a lifetime project.** Try it for a while and see what happens. (Bruce Pandolfini, *Pandolfini’s Chess Complete*)

**When it comes to studying the endgames from games, it is best to look to the past.** The games of Smyslov, Rubinstein, and Capablanca, for example, are great for this purpose. **Modern endgames are not as likely to be exemplary** because of the shorter time-controls and the discontinuance of the old practice of adjournments.

In the beginning of my chess career, endgame technique was my big weakness. In an attempt to solve this problem, I studied games played by

masters of the endgame. Most impressive to me was the technical ability of Vasily Smyslov, the seventh world champion. One of his methods of converting an advantage was an attack, even in the ending against the opponent's king. (Valeri Beim, *Chess Recipes from the Grandmaster's Kitchen*)

In the old days, you might have a handful of the best minds in chess analyzing a certain endgame position all night long. It is hard to beat that... even with today's computers. Some of the endgames with few pieces on the board have been solved by computers, but the remaining ones are often still better analyzed by humans.

**You need to know the basic endgame rules and basic endgame positions, at least from the common rudimentary pawn endings and rook endings. This is truer today than it has ever been because of the faster time-controls and the disappearance of adjournments.** One of the best sources is one of the classics, Reuben Fine's *Basic Chess Endings*.

**Especially initially, it might be a good idea to study endgames that you are likely to get into with the openings you play.**

The types of endgames which will really repay practical study are those which you can aim for right from the opening (this applies to many bishop versus knight situations) rather than those which essentially occur as the result of chance features in the position (as in most queen endings or pawn endings and some rook endings). (Leonard Barden, *How to Play the Endgame In Chess*)

**HOW:** Study at least one endgame a day. Take some of the time you spend studying openings and devote it to endgame study. Your results are bound to be better that way.

Place your endgame study at the beginning of your study period, when you are the freshest. The study of this phase of the game requires the most

concentration. Start with the simpler ideas and progress to the more complex ones.

## **POST-MORTEM ANALYSIS**

**If your opponent is a stronger player, always try to get his version of what was going on in the game. It is a free lesson and you should generally learn much more than you would out of a book. You will have just finished hours of considering each move deeply and, while it is fresh on your mind, you will be in a much better position to understand than in normal study. Ask him to tell you what was important in certain positions, what he would have done against certain moves, and ask him why he did this or that.**

Since your opponent's strengths and weaknesses in the various aspects of the game are unlikely to be the same as yours, you can even sometimes learn from weaker players. Even though you are the stronger player, he might be better at one area of the game than you are. If nothing else, when you see what was on his mind, you might discover concepts that you had not considered. Besides, it is good etiquette to offer to go over the game with the lower-rated player (especially if you won the game).

Be aware, during post-mortems, that the opponent usually overestimates their position at all times (as you do). Sometimes, they are completely unaware that they are overrating their game. At other times, they are protecting their ego. So, take that kind of assessment with a grain of salt, and be sure not to make the same mistake yourself.

**The post-mortem is for learning—not to restore your honor. Many players try to “win” the post-mortem. The idea is not to show your opponent how you should have won, or how you were always better; the idea is to have an honest look at the game for mutual learning purposes.**

# ANALYZING YOUR OWN GAMES

**WHY:** Just about all of the great players and trainers advocate studying your own games. Botvinnik went so far as to say that **carefully analyzing your own games was the single, most potentially rewarding, endeavor a player can do to improve his game.**

By analyzing your games, you can find out what was really going on in the game. This should help you to improve and to be more prepared for future games. **It will also help you to develop your intuition. If nothing else, it can help you avoid making the same mistakes again.**

My chess philosophy has largely developed under the influence of Ex-World Champion Mikhail Moiseevich Botvinnik. I am sure that the five years I spent at Botvinnik's school (1973–1978) played a decisive role in my formation as a chess player and determined the path of my subsequent improvement. Especially important, in my opinion, was the assimilation of Mikhail Moiseevich's main "axiom" regarding the necessity for constant analytical work, in particular the thorough analysis of one's own games. By strictly observing this rule, with the years I have come to realize distinctly that this provides the foundation for the continuous development of chess mastery. (Garry Kasparov, *The Test of Time*)

**LEARN:** Usually, **losses are much better than wins for learning from.** Losses are a great learning opportunity. **You want to discover, not only what your weaknesses are, but also the kinds of positions that make you uncomfortable.** "There is almost always more to be learned from defeats than victories, especially the spectacular ones" (Jacob Aagaard, *Attacking Manual 1*).

**CORRECT THE PROBLEM:** If you want to improve, you have to **be objective about your deficiencies and correct them.** Analyze the game; determine what you (and your opponent) did right and wrong. Then, correct

the problems so they do not happen again. You cannot improve much without knowing your weaknesses.

When you discover what your problems are (limitations in style, tactical weakness, endgames, or other), take steps to eliminate the problems from your play by studying the appropriate areas. **Study the areas in which you are the weakest.** After analyzing your game, review the sections of this book that pertain to the areas where you were the weakest in the game.

**ANALYSIS:** The first step in the process of eliminating the causes of your losses is to **analyze your games in detail. Ask yourself why the game (or the advantage) was lost.** Try to **identify the key turning points. Make annotations of your games.** “Botvinnik was an avid enthusiast for the annotation of games. He used to write detailed notes on most of his games and claimed that this was one of the most effective methods of improving one’s play” (Nigel Povah, *Chess Training*).

One helpful technique when analyzing your games is to reverse the board. Look at it from your opponent’s point of view. This can give you a more objective perspective. Another idea is to start a log of lessons learned from analyzing your games.

In order to analyze your own games accurately enough to be able to spot the deficiencies, you must learn to analyze well.

What is the essence of a chess master’s art? Fundamentally, it consists of the ability to analyze chess positions. True, at the board, you must be able to analyze very quickly and without touching the men; but in the last resort, whether you are working out the possible variations or estimating the actual position, **chess is the art of analysis.** Home analysis has specific features of its own: you are not restricted by time, and you can move the men freely. Despite this difference between home analysis and practical play, there is much in common between them. It is a well-known fact that **almost all the outstanding chess players have been first-class**



**analysts.** The deduction is irresistible: **anyone who wishes to become an outstanding chess player must aim at perfection in the realm of analysis.**” (Mikhail Botvinnik, *Botvinnik One Hundred Selected Games*)

**REGIMEN:** Try to spend at least two hours going over each of your losses in detail. Play numerous games and analyze them all.

## PRACTICE

*In chess, as in any other game in which you wish to advance, it is practice that counts.*

**—George Koltanowski, *Colle System***

A good way to improve your chess skills is to practice. A good way to practice is by playing many games at slower time controls. By necessity, shorter games limit the opportunity to practice your skills.

Korchnoi once wrote that to keep in good form he has to play 80 games a year. I need more. A minimum of 100, since calculating play requires constant practice, although, strange as it may seem, I am not a particularly “calculating” player. (Mikhail Tal, *The Life and Games of Mikhail Tal*)

Even masters and grandmasters need to practice. You still need to practice after attaining a level of proficiency in order to retain it. **“Frequent practice of a basic program gives better results than any pre-tournament cramming”** (Mark Buckley, *Practical Chess Analysis*).

## PLAYING VS. STUDYING

There are several viewpoints when it comes to the value of playing vs.

studying. Some say that the practical experience of playing a tournament game is more valuable and you should devote more time to it than to studying. They say nothing can replace a live game. “A good player will often see more by studying the possibilities over the board than by analyzing and moving the pieces about” (José Capablanca, *My Chess Career*).

There is the other school of thought, too; it believes that studying is more important. However, it is true that nobody seems to recommend all of one and none of the other. Some suggest various mixes of study and playing time, for example 60/40 in favor of one or the other. **Probably, the mix of playing and studying should be somewhere near 50/50.** The actual mix depends on the individual... some people need more practice, and some need more studying.

**If you want to make substantial improvement, you must do some studying and you must play. The combination of the two is what makes it work. You need to practice what you have studied, and you need to know from your actual play what it is that you need to study.**

Dr. Herbert A. Simon (winner of the 1978 Nobel Prize in Economics, pioneer in the fields of artificial intelligence and cognitive science, psychologist, and former professor at Carnegie Mellon University), postulated a 10-year rule of thumb which states that it takes about ten years of hard work to master a field such as music, mathematics or chess. Others have continued his research and have concluded that studying helps people to overtake those who only practice, whether in the fields of sports, music or chess. Their studies suggest that playing, even at the tournament level, contributes less to a player's progress than does studying.

## TRAINING

You can use training to improve your concentration, your calculation abilities, pattern recognition, and almost every aspect of chess. **Training with**

**a standard-sized chessboard is helpful. Using an off size board or a computer is not quite as beneficial.**

Make the training intense. Make it harder than a tournament game. It has to be that way so the actual game will seem easy by comparison. **Set goals (such as a certain number of puzzles solved per hour). Spend an entire evening training sometimes.**

**If you are practicing calculation, spend 30 minutes to an hour on each position. A session could include 3–6 positions.**

If you cannot afford a trainer, consider finding a friend who is about as strong as you are, but has the opposite style. You can work together and help each other.

## **EXERCISES/STUDIES**

**You should work on improving your weaknesses. One good way is to solve exercises in those areas.** Solving problems and studies helps you to develop your calculation and pattern recognition skills. Solve problems that require the calculation of complex variations. Solve strategic problems (problems that test your ability to find plans for going from the opening to middlegame or endgame). Solve endgame problems.

**Solve studies blindfolded when possible.** Try solving without the sight of the board and men. This helps you train your ability to calculate and your visualization abilities. For the same reason, try to follow games from magazines and books without using a board. This is all good practice. The tournament game is played blindfolded, in a sense. Since we cannot move the pieces physically in a tournament game, we do it mentally.

You can train your blindfold abilities in other ways too. One method is to play blindfold practice games with just pawns or just pieces.

# IMPROVEMENT

**LIMITS:** The older you are, generally the slower it is to learn and improve. “I always thought that one can improve until the age of 30; however, Topalov’s example refutes this. Still, it is hard to play one’s best chess at 40, although the critical age greatly depends on individual characteristics” (Arkadij Naiditsch, [Chesscafe.com](http://Chesscafe.com)).

Probably anybody can become an expert. If you start studying and playing chess at an early enough age, you can become a master. If you work hard at it, you can probably get to the level of an IM. To make grandmaster, though, you probably need more than hard work and study... some talent is probably necessary.

Because of the way the brain develops and changes with age, it is generally easier for a person to learn, the younger they are. According to R. Douglas Fields, the chief of the Nervous System Development and Plasticity Section at the National Institute of Child Health and Human Development, to acquire world-class abilities in many intellectual and athletic pursuits, you have to start young. “You can adapt those abilities in many ways, but neither you nor I will become a world-class pianist, chess player or tennis pro unless we began our training when we were children” (R. Douglas Fields, “White Matter Matters,” *Scientific American*, March 2008).

Scientists that study brain plasticity have recently discovered that, contrary to old beliefs, we continue to gain neurons in our brains even at advanced ages. By continuing to challenge our brains, we can continue to improve at any age.

**FORTITUDE: Improvement in chess is mostly a matter of work.** You have to put in the time and effort. As long as you have the desire to improve and you are willing to work, you will improve. Do not get discouraged from your losses; keep moving forward. Play and study.

Right at the outset I will say what the biggest barrier is that has to be overcome: LAZINESS... I have coached so many talented players through the years and very few of them went on to reach their full potential. Why? Because chess puts a barrier in your path at every stage and in order to get past the obstacle you have to work. It really is simple as that! A lot of people kid themselves about why they aren't improving. I'll tell you straight out: YOU ARE NOT PUTTING THE WORK IN! (Andrew Martin, *Chess Reports* #57)

**WHAT:** What needs the most improvement in players below master strength usually is one or more of three attributes: the awareness of the opponent's threats, a positional and strategic understanding, and experience with patterns and their associated plans.

**Failing to Improve:** Usually, the reason a player does not improve is he continues to make the same mistake repeatedly. In other words, he fails to learn from his mistakes. That is probably because either he has not identified his mistakes, or he has not taken steps to overcome them.

**HOW:** To improve, generally it is best to play a more conservative game than to try to be a mini Tal. By trying to play too wildly, you are not learning the proper way to play.

Spend at least as much time working on your weaknesses as your strengths. Review, frequently, the concepts that you understand the least until you master them. Try to **balance your style by working on the kinds of positions that are uncomfortable for you.**

Distributing the effort evenly sounds correct. One who only develops his best skills cannot fulfill his potential. We should strive for versatility. It is impossible for a tactical player to create mating attacks in every single game. One can try to create positions that you like, but in chess, there are two people playing, so you have to be prepared for different types of

positions. (Farrukh Amonatov, [Chesscafe.com](http://Chesscafe.com))

**Learn from your losses.** Analyze the game in detail. **Figure out why you lost and improve in the areas where you made mistakes.** These mistakes can be individual moves, technique, strategies, or even personal character flaws. **Look for the underlying psychological reasons for each mistake** (things like memory, attention, confidence, or understanding). Break any bad habits that you have.

You have to know what both your strengths and weaknesses are. **Study your weaknesses, but try to play into your strengths.** “Unless you know where you are, and where you want to go, progress is impossible” (Jan Przewoznik & Marek Soszynski, *How to Think in Chess*).

**Pick a model.** Pick someone whose style you like and copy their opening repertoire, their ideas, and, in general, try to play like them. Solve studies, puzzles, and problems. Try to do them in your head. Read chess books without a board, follow the game and the analysis in your head.

**Pick a position (from an opening, a common position, a critical moment from a game, or a study) and analyze it deeply (for hours).** Uncover every detail in the position. By doing this with several positions you will substantially improve your ability to handle similar positions and you will generally attain a greater understanding of the game.

**Learn a few openings extremely well, rather than a lot of them poorly.** This way, you will still be familiar with the general strategy deeper into the game.

Studying and playing are both necessary in order to improve. You should do both. **Join a chess club** so you can get in a lot of practice with tournaments, blitz and post-mortem analysis.

Get a teacher or coach if you can. A good teacher can save you a lot of time in your pursuit of improvement and they can help to keep you from acquiring bad habits along the way.

Most of all enjoy what you are doing. Remember, it is a game.

## **BECOMING AN IM OR GM**

There are GMs that think anyone can become an IM with a few years of hard study and a lot of playing. To a GM that may seem true. Maybe it is.

Mike Klein, in an article in *Chess life*, referring to Malcolm Gladwell's recent book, *Outliers: The Story of Success*, said:

The statistical guru drew on the research of neurologist Daniel Levitin to postulate that it takes good, old-fashioned hard work to become great in any field. He said the average person takes 10,000 hours to assimilate the elements to reach mastery, whether the activity is music, computer programming or chess... (Mike Klein, *Chess Life*, January 2009)

In this context, Klein said that Gladwell defined success in chess as the grandmaster title. Klein said that the only difference between the various levels of success is hard work. The players at the top work much harder than everyone else does.

# 10



## ***Speed Chess / Blitz***

*Of all the kinds of chess activity—tournaments, studies and so on, five-minute chess is most like a pure game, the elements of science and art receding into the background.*

**—Nikolai Krogius, *Psychology in Chess***

### VARIANTS

THE TERM “BLITZ,” which is german for “lightning” has become the word that is generally used for all forms of speed chess these days. In the old days, blitz generally meant games in which the moves were played without hesitation, or with about five seconds per move. There are, today, many variants of speed chess. For example, there is bullet, rapid transit, 5-minute, lightning, and skittles (a term that can also refer to offhand slow games).

Many trainers and coaches believe that blitz reveals the raw natural talent in a player, more so than the player’s strength. Talent is necessary for strength, but more than talent is needed to become a strong player.

### PROS AND CONS OF BLITZ

**TIME-TROUBLE:** There is a difference between blitz and time-trouble. one difference is that you are not usually in time-trouble on the second or



third move of a classical game. Time-trouble does not usually occur until much later in the game. In blitz, you are ripping through the opening and middlegame, which is not common in a regular game.

In time-trouble, late in the game you will have spent considerable time studying the structure and strategy of the game, and so you would be much more familiar with the nuances of the positions than you would be in a blitz game in the same position.

On the other hand, in blitz, you do not have to keep score (which is an interruption of thought), you are not at the tail end of hours of grueling thought (as in a regular game) and your opponent has the same time constraint as you do.

**Nevertheless, being good at blitz does help you in time-trouble.** If nothing else, it helps you to realize that you can still play a decent game with only a few minutes left on the clock. In that way, it can give you confidence.

**CALCULATION/TACTICS:** Playing blitz, especially more serious training games, **helps improve your calculation speed. It can help with your tactical vision. It is a good way to hone your tactical and combinative skills.**

**The best blitz players are usually brilliant tacticians.** Blitz games allow you to experience more tactical patterns in less time than in classical games. **Blitz also trains you to be more aggressive and to respect the initiative.** “I played thousands of blitz games during my early years, which helped to develop a quick, tactical skill. **Blitz is an ideal way of quickly learning tactical patterns that are the basic ingredients for successful attacking play**” (Larry Christiansen, *Storming the Barricades*).

**ANALYSIS:** Speed chess games are generally of such poor quality that it is often considered to be of little or no value to analyze them. Generally, as the saying goes: “he who analyzes a blitz game is stupid.” Then again, if there is something you did not understand, or missed, it can be worthwhile to go back

to check on a certain detail or two. “Even casual five-minute games are opportunities for bursts of calculation and quick postmortems to pinpoint errors. Some of the great players were raised on speed chess” (Mark Buckley, *Practical Chess Analysis*). Alexander Vaisman, one of the most influential coaches of the Ukraine for the past 25 years, had this to say about analyzing blitz games:

**Even games played at rapid time controls should be analyzed.** I believe that such games are, if anything, even more informative for determining the strengths and weaknesses of a player. At slower time-limits, one’s weaknesses can be concealed behind long thought, but in rapid and blitz games, they stand out much more clearly. Kasparov’s trainer Alexander Nitikin has written that the future World Champion used to write notes even on his blitz games. (Alexander Vaisman, *The Chess Instructor* 2009, Jeroen Bosch & Steve Giddins)

**IMPROVEMENT:** Probably the best way to use speed chess as a vehicle for improvement is to play it as though it was a fast regular game. In other words, do not use the tricks and tactics that are exclusive to speed chess; **play good chess**, even if you lose on time. “Playing blitz training games helps you to calculate a bit faster, your play becomes more stable, and your tournament results will be better” (Christian Kongsted, *How to Use Computers to Improve Your Chess*).

**OPENINGS:** You can get a lot of practice with your openings by **playing loads of blitz games**. There is more freedom to try out new ideas in your openings with blitz, as well. Opinions are mixed on whether you should play your standard openings. Some say that you should play your regular openings for practice. Others say that it helps to play openings that you do not usually play.

**BRAIN FUNCTION:** There is a lot of recent research in neuroscience that

suggests that activities that encourage the brain to process information rapidly and efficiently are good for memory function and concentration. Activities that require creative thinking under time-pressure (such as some video games and blitz chess) may even help to reverse age-related changes in memory function.

**AGAINST:** With too much speed chess, **you can develop bad habits like playing too fast without deep thinking.** It is not serious chess. You learn a lot more in one serious game than in dozens of speed games. “We have to realize the difference between rapid chess and classical chess. One form is spectacular, another one is deep—they are essentially different” (Boris gelfand, *New In Chess*, 2007/5). Bullet (one-minute) Chess has few, if any, supporters as a recommended way to improve.

**FOR:** it is good for increasing tactical daring and developing your intuition. It is good time-management practice. It is good for practicing technique. It is fun. “Blitz chess is helpful in recognizing chess patterns. Play often” (Bill Wall, [Chesscentral.com](http://Chesscentral.com)).

**It hones your reactions, trains your composure, and helps with your general chess understanding. In many ways, it is more exciting than regular chess.** “I advise you to play lots and lots of it. You’ll find it desperately frustrating when you blow out, but i firmly believe that many of the experiences and associations will remain with you, almost as subliminal learning” (David Mabbs, *Chess*, May 2009).

## **FASTER TIME CONTROLS**

There seems to be a general trend toward faster time controls. It certainly makes for a better spectator event than slow chess. It is more likely that faster games will be picked up by television than the slower, more boring to the public, classical game.

Rapid chess, or quick chess, is closer to classical chess than blitz and, as a result, has some of the attributes of both. There is more time to find a plan and calculate deeper and more accurately. The quality of the endgames generally goes up, as well. In fact, the quality of the whole game is usually higher.

## TIPS FOR PLAYING BLITZ

**PACE:** In a 5-minute game, play the opening rapidly and then **settle into a pace of about one move per 3–5 seconds**. If you get behind in time by about a minute or so, you are flirting with disaster. If your endgame technique is strong, you might be able to get away with it; otherwise, you need to pick up the pace.

**A 5-second per move average pace should give you adequate time and will force your opponent to keep up or lose on time.** It also is good pace training for 5-second time delay in classical games. It should be rare for you to take more than five seconds to make a move.

**When you get down to fifteen seconds, your pace should go up to one second per move.** Of course, moves made at this speed will be superficial, at best, but it is the right strategy under the circumstances. Look for concrete mates. Do not consider material, just threats. **Maintain the tension and do not simplify** (this way, you give your opponent more to think about).

**When you are down to the last five seconds, there is no time to think, move. A trick in this situation is to move the piece closest to the clock.**

If your opponent is way behind in time, you can afford to take longer to move. **You should not make any head movement when you look at the clock (this could tip him off about his time-trouble).** Move physically slower and press the clock gently. You want to lull him into a lackadaisical frame of mind. **Keep the game complicated. Keeping the tension is more important than realizing small advantages** (such as isolated pawns, or

outposts).

**OPENING:** You should play the openings you know, or play an unusual opening especially prepared for blitz, but **sharp openings are best in blitz**. Aggressive openings that give you a tactical initiative are the best. Try to spring early surprises on your opponent (prepare some in advance). You will gain time on the clock while your opponent tries to figure out how to avoid a trap.

**ATTITUDE:** You have to understand the position immediately. You have to be able to calculate quickly. Strong nerves are vital. Do not fixate on the importance of the game.

**CASTLING:** In speed chess, it is important to castle quickly. Castling quickly is much more important in speed chess than in regular chess. While you are at it, **create some luft at the first sign of a back rank weakness**. Many speed chess losses come from back-rank mates.

**TACTICS:** Take the steam out of your opponent's tactics before he can use them. **Break pins**, keep your pieces protected, shield your king from checks, and be alert to forking possibilities.

Play tactically. The player best suited for sharp games is the likely winner. **Do not worry too much about strategy**; there is not time.

**Make sacrifices when they look good.** your opponent does not have time to calculate every line. Often, your opponent will assume the sac is sound.

**INITIATIVE:** The initiative is especially important in blitz. do not be afraid to give up a pawn for the initiative. Sharp, aggressive pressure is the key. Create threats and force your opponent to defend. Active play is easier than playing defensively in blitz. This does not mean that you should try to play for a brilliancy. Just keep up the pressure.

**ENDGAME:** good endgame technique not only enables you to play the endgame faster, but also wins more games than mating attacks. Blitz is a good way to practice that technique as well.

**PAWNS: Keep your pawns in front of your pieces.** The starting position in chess is the ideal (pawns in front of the pieces).

**TRICKS:** One trick is to **play moves in pairs**. Spend about twice the time finding two moves in succession. Play the first move; then, after your opponent responds, play the second move immediately. This should cause him to spend more time considering his move and prevent him from using your time for thinking.

There is more room for bluffing in speed chess than in classical chess. If you cannot find a good move, a good bluff is to make a long move with a piece. Your opponent will have to consume some time trying to figure out what you are doing.

**Knights are often better than bishops in blitz**, because knights are sometimes impervious to attack from bishops. Knights can always take bishops, but not always the other way around (the knight might be on the opposite color). In addition, their move requires a little more time for your opponent to consider.

If the game is so severely lacking of a winning chance, we have no choice but to create one out of nothing. This means that we must play a move that is totally unsound, but will turn the tables if overlooked. (Jonathan Maxwell, *Blitz Theory*)

If you don't mind using some underhanded tactics, here are a couple more tips: By placing your pieces so that they are way off center on the square, or even on the line, you might distract your opponent (he may be slightly sidetracked or even take the time to adjust the piece). If your opponent forgets to push the clock after his move, try to look as though you are in deep thought (he might not notice the clock for a few seconds). And, don't forget smack talk. "The good blitz player knows how to talk trash" (Jonathan Maxwell, *Blitz Theory*).

# 11



## *Computers*

*Chess nowadays is very high-tech. I have heard that Kasparov's computer files and databases have to be seen to be believed, with massive data and commentary on practically every opening.*

**—Larry Christiansen, *On Top of the Chess World***

## NUMBERS

The theoretical maximum of the number of possible chess games is  $321^{6300}$  which is roughly  $10^{15790}$ ..... which is **far more than the number of atoms in the universe**. This fact leads us rapidly to the conclusion that if each atom in the universe were a computer and if all these computers worked together then they would still not be able to play the first move in the perfect game of chess in anything less than millions of years, by which time all the computers would have died of old age. (David Levy, *Chess and Computers*)

IF YOU FOLDED A PIECE of paper in half (doubling its thickness) 42 times, the resulting thickness would reach the moon! With about eight more folds, it would reach the sun! That is just because of the power of doubling! The number of possible chess moves increases at a much higher rate than doubling does, because on each move there are often 30, or more, possible replies (not

just two). That is why the numbers become so staggering.

By four moves, it has been estimated that there are over a quarter of a trillion possible chess positions. If you multiply each successive half-move by 30 (which, remember, is a great deal more than doubling), and when you consider that chess games can go well beyond 42 moves (something near 6,000 moves is theoretically possible), you can begin to imagine how big the number of possible chess games is. Although, it is unlikely that anyone can truly imagine a number that large.

“The number of possible chess games is approximately  $321^{6300}$  which is roughly  $10^{15790}$  (that is over twenty thousand googols). To illustrate how big that number is, consider that less than  $10^{18}$  seconds have elapsed since the Earth was formed some 4.6 billion years ago” (David Spanier, *Total Chess*). The number of atoms in the observable universe, according to astrophysicists, is between  $10^{72}$  and  $10^{82}$ . The number of possible chess games is much larger than that (more than a million trillion multiplied by  $10^{15700}$  times larger).

In other words, the number of possible chess games is more than a million trillion times larger than ten followed by 15,700 zeroes times larger than the number of atoms in the observable universe! So, do not expect to be seeing too many duplicate games in your lifetime! Of course, this includes an extraordinary amount of incredibly stupid games (many of which are now in my own personal database); not to mention, a lot of atoms that we will never see. Considering that these incredible figures are based on regulation chess; imagine what they would be if they also considered the Fischerrandom system!

In 2009, computers were looking at positions at the rate of something in the low millions per second. At these speeds, they are only able to see about seven moves ahead for each side. Grandmasters are usually capable of much greater depth. Someday (maybe not soon, but someday), computers should be able to look at a billion positions per second. Still, given the magnitude of the numbers involved, that speed would only be a drop in the bucket (and a very



large bucket at that).

It is clear that computers will not be able to play perfect chess anytime in the probable future. In a way, that is good because, if that day ever comes, chess will lose its charm. In fact, the game could well vanish. Fortunately, if it ever happens, it will likely be much more than a few centuries from now.

Meanwhile, computers are changing the way we play chess. The game is getting more concrete and less vague. The computer can get away with moves and concepts that humans are skeptical about gambling with (such as leaving pieces unprotected, or having a temporary lack of piece coordination). Since it can see the tactics for the next half dozen moves or so, the computer can take advantage of various anti-positional ideas that would be suicidal for a human. As a result, the computer has its own style. It has a style that is somewhat different from human. The younger players are starting to resemble the computer style more and more every day.

## TRAINING WITH COMPUTERS

There are some definite benefits to training with a computer. They are good for **practicing openings**. You can get **up-to-date theory** now almost instantly. They are also good for **tactical practice**. They are not good though for learning much about pawn structures, strategy, or intuition.

A student with a computer can do a lot by himself these days. Instead of taking lessons, countless novices are learning by themselves with the aid of a computer. People are learning the game and improving much faster in our time because of computers. The computer itself may be limited as a player, but there is human training available on the computer. There are instruction sites on the internet. A student can follow annotated games in databases and even practice with live games against human opponents on the internet.

**One good training technique with a computer is to set up a position and play it out several times. That will help you to get a strong feel for**

**that specific type of position.** For example, you can practice playing with and against the IQP, or you can practice specific endgames. You can even put these positions in your own database for future reference and practice sessions.

## DATABASES

Databases are excellent tools for the computer user. With a database, you can search any position and you will find games with the same position (or one with certain key elements). Using these games, you can see how the top players handled the position and what strategies were successful and which ones were not (and why).

If you want to see how to handle a certain opening, you can search for a specific pawn structure, for example, or just the central pawn structure. With the various filters available, you can limit the games to a certain minimum rating level if you want. This way, you can learn in a few hours with a computer what might take months with books and magazines.

Using a database, you can search for the current board position, and the program will return a collection of games that includes this exact position. By examining these games, you can see which plans worked in that position, and which ones did not. (Robert J. Pawlak, PhD, *Chess Software Sourcebook*).

ChessBase offers several commercially available databases of different sizes and types. There are services that will update your databases. You can even download a lot of games and databases from the internet.

## PLAYING

Usually, a human has a better chance with the slower time controls when

playing against a computer. The faster the game, the better the odds are for the computer.

To survive, try to play a positional game against the computer. Computers are almost flawless tactically, but they do make positional mistakes. Computers are usually willing to give up a positional advantage for material gain. Once you have a decisive positional advantage, you can win tactically if that is what the position calls for.

Computers are best in open positions, so steering the game into a closed one can be your best strategy. In fact, many of the engines are programmed to avoid closed games, so you should receive some concessions from the computer (such as playing an inferior move) as it tries to avoid the closed game. “Most of the top engines are programmed to avoid closed positions, as they cannot find the long-term plans necessary to play these positions” (Christian Kongsted, *How to Use Computers to Improve Your Chess*).

Computers hardly ever make positional sacrifices. Computers are almost perfect when it comes to short-term tactics and sacrifices, so avoid tactical skirmishes unless they are clearly favorable. Long-term positional pawn sacrifices, positional exchange sacrifices or unclear piece sacrifices can be effective against a computer.

You should avoid trying to win material unless you have the positional advantage to warrant it. Otherwise, it is probably a mistake to take the material. Try to steer the game into the type of game that can be planned far in advance. Your ability to plan is much greater than the computer’s (which is virtually zero).

Computers do not bluff and their sacrifices are generally sound (although a program could be designed to bluff, and some are probably available). Because of that, understanding a computer’s sacrifice is a little easier, since you do not have to wonder if it is speculative.

Unbalanced material can sometimes work to your advantage against a

computer. For example, three pawns for a piece might give you an endgame advantage for which the computer cannot plan.

## ANALYSIS

The trend is toward using the computer more for analysis and training than as an opponent. It is best to analyze without the computer first and then double-check with the aid of the computer. Write your analysis down and compare it to the computer's evaluation.

The way it works with computers, they cannot tell you what is happening in quick evaluations. You have to feed them ideas and you have to confront them, and you have to question their evaluations, and finally they're going to get you to where you want to get. (Roman Dzindzichashvili, *Roman's Lab*, Vol. 4, DVD)

When you analyze with a computer **do not accept everything it says**, it is good to add the human touch. The computer is tactically nearly flawless and extremely good in open positions, but in closed positions, where few or no pawns have been exchanged, your input may be valuable. In all kinds of positions, be watchful for positional concepts. Look for exchange sacrifices. In addition, when you analyze with a computer, push the forcing lines deeper until they reach quiescence.

Do not always assume that the computer's analysis is correct. Analyzing grandmaster games with a computer can be deceptive.

The tension of the struggle can, in a tournament game, sharply increase a chessplayer's ability to concentrate, along with his ability to grasp intuitively what is happening on the board, allowing him, at times, to resolve the problems which arise better than any computer could. (Mark Dvoretsky, *Dvoretsky's Analytical Manual*)

Computers are good for finding opening lines in sharp variations that have been passed over on general principles. The computer can help you navigate through the complications.

If you are analyzing a position and the computer's evaluation erratically skips up and down from ply to ply (changes radically from half move to half move), that is a sign that the computer is not sure what is happening in the position. It is having trouble deciphering the position. It is probably a tactically complex position. "When analyzing with a computer, and it shows two moves that could transpose into each other, **the best move is the one that limits the opponent's options**" (Robin Smith, *Modern Chess Analysis*).

Sometimes, in positions where there definitely is a 'best move,' one program might find this move, literally, many tens of thousands of times faster than some other programs. This is an astounding statistic, and it is one reason why it is so important to use more than one analysis engine when doing analysis. Ideas which one program misses completely might be found by another program extremely quickly. (Robin Smith, *Modern Chess Analysis*)

## WEAKNESSES

Computers are usually weak in unbalanced positions. They are also typically weak at understanding positional concepts, such as fortresses or maneuvering. There are times in chess when you should do little or nothing. The computer is generally looking for tactical disputes. Often, they will not understand when a positional concept is not applicable to a certain position.

They have trouble understanding long-term positional pawn sacrifices (such as in the Benko Gambit). They usually have trouble assessing exchange sacrifices properly. They are weak in handling positions when the players have castled on opposite sides.

Of course, they have no intuition. A human with great intuition can often outplay the computer.

Human beings possess a very powerful instrument known as “intuition” which guides their calculations and makes them more trustworthy. This is the current difference between strong contemporary chess computers—whose intuition is zero, but whose ability to calculate is staggering—and human players. (Leonid Shamkovich, *The Chess Terrorist’s Handbook*)

Computers are, for all practical purposes, unable to plan. In a sense, they can have short-term strategic goals, but not long-term. As a result, there is no transition from the opening to the middlegame... it just happens. The same is true going into the endgame. The computer does not plan on the endgame while it is in the middlegame.

Computers are not good at evaluation. If there are no tactics involved, you cannot trust their evaluations. Computers have difficulty assessing positions with outposts, weak squares, and doubled pawns (or other static elements). “The ability to take a creative risk is one of the brightest features that will always differentiate a chessplayer from any high-speed wonder of electronic technology” (Eduard Gufeld & Efim Lazarev, *Leonid Stein, Master of Risk Strategy*).

## INTERNET

Playing on the internet can be a good way to regain some form if you have not played in a while. It is also a good way to test some new openings.

It is available 24 hours a day and you can find some of the stiffest competition possible. You have a chance to play famous players.

To be good training, you should play fewer games but at slower time controls and against strong players, rather than more of the faster games.

# 12



## ***Correspondence Chess***

*The world of correspondence chess is almost entirely ignored by over-the-board players—unjustly, for plenty of ideas can be gleaned from it, striking and profound ones, diligently worked out in home analysis.*

**—Mark Dvoretsky & Artur Yusupov, *Attack and Defense***

CORRESPONDENCE CHESS, or postal chess, has not only the appeal of over-the-board chess, but has a few additional attractions of its own. It is more informal, relaxed, and provides a chance for some socializing (even though by mail). It allows you the prospect of testing various openings using reference books. Correspondence chess usually produces some of the best games that your ability will permit you to play. Furthermore, and possibly most importantly, **it encourages in-depth studying of each of the stages of the game.**

**Correspondence chess usually produces a much higher quality game than regular chess.** With the extra time allowed for each move (sometimes a matter of days) the analysis is usually much deeper and the strategies more profound. There are usually a far fewer number of (and magnitude of) mistakes. The players generally try to analyze variations as deeply and accurately as possible. **The study of some of the top correspondence games can be an excellent source of ideas and instruction.**

It is one of the better-kept secrets of chess that postal players play a much

stronger brand of chess than OTB players do, with less errors and blunders. Postal players' analysis is deeper, and their strategy is more profound. This is not because postal players are inherently better than OTB players, but simply because postal players can better budget their time to delve the secrets of the position than OTB players. With days instead of minutes to find the truth of a position, postal chess becomes the highest standard of our game. (Alex Dunne, *Modern Postal Masterpieces*)

The opposite of blitz (where playing an unusual or surprise opening can have a beneficial effect), in correspondence chess it usually pays to stick with the main lines of theory, and to deviate only when you are sure you are making an improvement over conventional lines. If you deviate too early, your opponent has plenty of time to find a refutation.

Here are a few tips for playing correspondence chess: Double-check that the move on your board and your score sheet match the one on the postcard. Double-check that you are analyzing from the proper position. Play as slowly as you can (use all of your legal time) because you gain time to devote to other games, and you might even win a few games from people who resign because they lose interest (or their willpower) once they realize they cannot win the tournament. Do not supply conditional moves ("if" moves) for the same reason; they speed up the play (they also can furnish useful information to your opponent).

If you are interested in playing correspondence chess, you can go to the USCF's website: <http://main.uschess.org>. There are also masters and GMs that will play postal chess with you and analyze your moves. Their fees are usually reasonable and you can usually find them in the classified section of the USCF magazine *Chess Life*.



# 13



## *About Principles*

*No rule is correct all the time!*

—**Jeremy Silman**, *The Amateur's Mind*

TO PLAY CHESS AT A strong level, it is essential to play according to **sound principles**. General knowledge is indispensable. With a good foundation in general principles, your mistakes will be infrequent and your play will be stronger. “Every chess player who wishes to improve his level in the difficult subject of chess is obliged, first of all, to study methodically and understand the existing principles that govern the theory of the opening, middlegame and endgame” (Efstratios Grivas, *Chess College 1: Strategy*). Given the huge number of possibilities in chess, a player must learn principles in order to put some kind of order to the complexities of the game. If a move is bad enough, you can refute it with general principles.

All the big general principles of chess are just various aspects of the fundamental guiding principles, e.g., development in the opening, cooperation of forces, reserve the greater option, waste as little energy as possible on defense, an unsuccessful attack will recoil on the head of the attacker, choose only feasible aims or those which can be defeated only by some concession, e.g., a badly weakening move. (Cecil Purdy, *the Search for Chess Perfection II*)

Principles are often in conflict with each other; the idea is to learn to appreciate which principle prevails in a given situation. “Any position may have peculiarities which rob a given rule of all its significance, since some other rule will be more relevant” (Isaac Lipnitsky, *Questions of Modern Chess Theory*). You have to reconcile wide-ranging general strategical concepts with subtle tactical nuances—a conflict between the general and the specific. A player’s skill level is determined largely by his knowledge of principles, his ability to know which principle prevails in a particular situation (especially when there is a conflict between two or more principles), and knowing when to violate a principle.

The principles of chess are only a sign-post; they cannot be considered under all conditions to be reliable pointers to correct procedure. Sometimes we have players who, besides their basic command of chess principles, use something more—the intuition of an artist. This helps them discover hidden possibilities, unearth surprising combinations, and create games of lasting aesthetic worth. In this union of scientific and artistic elements lies the true greatness of chess—that wonderful product of the human brain. (Luděk Pachman, *Modern Chess Strategy*)

A strong player will often be violating one principle while observing another. Unfortunately, there is no principle that tells you which principle is the most important in these cases. “In the art of chess there are no unalterable laws governing the struggle, which are appropriate to every position, otherwise chess would lose its attractiveness and eternal character” (Vasily Smyslov, *My Best Games of Chess*).

Not only are some principles more helpful or correct than others; there is often some dispute over their soundness. There are some basic principles that are rock solid sound and must be learned. These are more aptly called “rules.” They are the fundamentals. On the other hand, most principles vary in their

usefulness from position to position. “Chess maxims vary enormously in reliability” (Cecil Purdy, *C.J.S. Purdy’s Fine Art of Chess Annotation*).

Do not blindly follow rules and principles and apply them mechanically. You must understand them; otherwise, they will not be as helpful. You have to know why they are useful and you have to know how to use them correctly. “Knowing the precepts alone doesn’t win a chess game. You also must play strong moves” (Bruce Pandolfini, *Pandolfini’s Chess Complete*).

There are times when there are exceptions to the rules, especially for dynamic or concrete reasons. It is sometimes difficult to know when those times are. More often than not, though, you should not violate the principle. Masters usually look for exceptions to the rules; they like to think out of the box. Still, **an examination of grandmaster games will reveal that they follow principles much more often than they violate them.** In fact, the majority of grandmaster mistakes happen when they think they have discovered an exception to the rule.

An example of an exception to a rule would be capturing a queen on the a-file with a knight. You may end up with a knight on the rim, but you have won a queen (which is, in most cases, much more important). As well as, in the case of the opening moves 1.f3 e6 2.g4, black can give mate on the move, but that would involve breaking the principle of not moving the queen early in the opening.

There are no rules in chess that are always right, and every rule has exceptions. Yet, you have to understand the rule first before you can appreciate the exception. “As the Rumanian grandmaster Mihai Suba likes to say, “The Golden Rule is that there are no Golden Rules!” (Daniel King & Chris Duncan, *Choose the Right Move*).

You should break the rules only when there is a good reason to do so and only after direct calculation. Moreover, do not go out of your way to find refutations to principles; it is much better to spend your time learning them.

The main idea of having sets of principles and guidelines is that they save you enormous amounts of time and reduce potential errors by steering you in the right direction. Many times, they will save you from making long calculations. They are a guideline for sound play. Use principles when neither side has a forcing line or a combination at hand.

Weaker players should follow general principles more so than the stronger players should. Stronger players can consider the exceptions and study more of the specifics, such as openings.

Specific circumstances are usually more significant than general ones, though. Concrete analysis should generally prevail over general principles. For example, if you have a checkmate on the move, you can safely violate any general principle.

In seeming contrast, the big picture is more important than a few basic principles. Put another way, the universal principles usually trump the phase-specific principles. For instance, general principles are usually more relevant than opening principles. An example would be the idea that loose pieces drop off would generally be more important than an incompatible opening principle.

Since **CHESS WORDS of WISDOM** is about general principles, quotes and understanding the game of chess, it seems only fitting to end it with a pertinent quote that pretty well sums up both this final section, and the book itself. So, with a tip of the hat to Neil McDonald:

Rules and precepts are valuable and any ambitious player must assimilate all the positional laws, and make them part of his chess intuition. But then he must “forget” them at a conscious level and look closely without any prejudice at the position in front of him. It is the specific features of the position, evaluated and checked by reasoning and calculation, which the player must attempt to comprehend. Only then will he truly understand chess. (Neil McDonald, *Planning*)



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